Food Choices in Flux: forecasts of strategies, contexts, and emerging values in four regions
about the ...

The Global Food Outlook Program

Food sustains and nourishes us, and it also increasingly connects us to a global food web that is intertwined with politics, economics, environmental concerns, culture, and science. This global food web is undergoing rapid change, presenting considerable challenges and significant opportunities. IFTF’s Global Food Outlook Program provides a distinctive perspective on the global food web, food markets, and the connections and discontinuities between everyday choices and large-scale challenges. We help organizations work with foresights, disruptions, and dilemmas to develop insights and strategic tools to increase their effectiveness and resilience in a volatile world.

The Institute for the Future

The Institute for the Future (IFTF) is an independent, nonprofit strategic research group with more than 40 years of forecasting experience. The core of our work is identifying emerging trends and discontinuities that will transform global society and the global marketplace. We provide our members with insights into business strategy, design process, innovation, and social dilemmas. Our research spans a broad territory of deeply transformative trends, from health and health care to technology, the workplace, and human identity. The Institute for the Future is located in Palo Alto, California.

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“What’s for dinner?” is no longer a simple question.

Millennia of subsistence agriculture and staple foods have given way to a world of abundant choice from among seemingly limitless quantities and varieties of food. As family meals have begun to disappear, as internationalization of the food trade has exposed consumers to new options, and as consumers have moved from home-cooked to convenience food, people all over the world face complex decisions several times a day about what to eat.

These choices aren’t simply about finding the best-tasting foods; people are increasingly using food to improve their physical health and express their personal and social values. Beyond just thinking about what they might feel like eating, they are viewing everything, from their food’s labor, soil, and resource inputs to the identity of a retailer, as critical markers for their daily decisions.

Underlying this complexity is a growing recognition among consumers that their choices matter. In North America and Europe, decades of abundance have given rise to obesity and diabetes, essentially replacing diseases of hunger with diseases of plenty. This transition is taking place even more rapidly and dramatically in China and Brazil, where parents who once faced the threat of hunger are now watching their children struggle with obesity, but where lack of access to food remains a serious concern for many people.

Personal food choices don’t just matter personally; they also affect social well-being and local and global environments of the entire food web.* Growing concerns about sustainability are making certain kinds of foods seem virtuous and others wasteful, yet many of the most resource-intensive foods, such as beef, are also seen as strategic to building social connections and expressing status and identity.

This forecast report highlights the ways in which consumers in Brazil, Europe, China, and North America will seek to navigate this confusing landscape over the coming decade. These forecasts point toward new values that consumers will emphasize, new contexts that will shape their choices, and emerging strategies that consumers will use to make food decisions. Each forecast includes insights pointing toward new kinds of consumer behaviors that will emerge from these forecasts, along with actions that you can take in response to these demands.

In addition, for each geographical area there is working space in which you can capture the insights and actions that occur to you as you read the forecasts for that region.

* Read more about food webs in our 2009 report, “Food Webs 2020” http://iftf.org/Foodwebs
Newfound affluence will allow Brazilians to be more discerning with their food choices, giving them the opportunity to express their values, such as pride in sustaining local rainforests and the novel foods within them, or reverence for physical beauty. At the same time, it’s a country in transition, in which the savvy new generation acts as a guide for their elders. Government is rushing to enact health and sustainability regulations while processed food culture is still nascent, and food companies compete to be the first to provide processed food to communities that previously lacked access.
Forecast 1: 

The rise of culinary eco-patriotism

While the emerging middle class of Brazilians is able to sample more of the world’s food offerings, home-grown products are finding a larger market both locally and on the world stage. Eating foods from parts of Brazil—particularly remote areas such as the Amazon—is becoming a way for residents to express their national pride, and at the same time to eat foods that they feel are produced sustainably, with a low carbon footprint. Over the next decade, this interest in traditional Brazilian foods will increasingly be linked to notions of sustainability, economic development, nationalism, and solidarity. A culinary “eco-patriotism” will become a key value filter in making food choices, bringing both ecological and patriotic values to bear at the dinner table.

Already, indigenous Brazilian ingredients are becoming the basis for new tastes and food experiments. In São Paulo, urban Brazilians are lining up at a new chain of ice cream shops for a first taste of obscure Brazilian fruits such as aracá, jatobá, and murici. For high-end dining, people are seeking out restaurants that offer gourmet versions of domestic Brazilian dishes instead of the French or international cuisine traditionally favored by Brazil’s elite. Although foreign foods will continue to gain traction in Brazil, a growing segment of the country’s population are following their eco-political sentiments toward foods and recipes that bring them more closely into proud ecological harmony with their cherished homeland.

INSIGHTS

Meanings of sustainability will expand. As environmental stewardship and economic development intersect, meanings of sustainability in Brazil will expand, with sustainability seen as critical to long-term economic vitality. Consumers will look for foods that combine multiple kinds of sustainability value and that are produced in ways that improve the financial position of Brazilians, while also improving both the national and the global environment.

Brazilian foods will be connected with status. As eating ecological foods becomes a patriotic act, having an eco-patriotic diet will come to be seen as a means of increasing social status and a form of conspicuous consumption. People will look for packaging and other forms of messaging that clearly convey the values behind their foods—and will make those values clear to friends and family.
**Description**

Frutos do Brasil is a new Brazilian food brand that offers an unparalleled selection of popsicles and ice cream made from dozens of Brazilian-grown fruits. Flavors range from the familiar pineapple and açaí to fruits that are obscure even to Brazilians, such as pequi, araticum and mangaba. The brand’s highly patriotic marketing strategy draws heavily on the Brazilian flag and focuses on biodiversity, emphasizing that through food choices, consumers can make a positive impact on the country’s environment. Many of the brand’s customers are experiencing these flavors for the first time and are associating the experience with a strong sense of eco-patriotic pride.

**Relevance**

In recent years, Brazilians have become keenly aware of the threats that ever-accelerating industrialization poses to the ecological richness of their nation. By offering Brazilians—and soon, international audiences—a way to express their love of the nation and its natural environment through food choices, Frutos do Brasil has given consumers an opportunity to have a fulfilling culinary and political-ecological experience. The value of feeling good about the provenance of one’s ice cream cannot be underestimated.

**ACTIONS**

**Develop domestic agriculture and production capacities.** For manufacturers looking to enter the Brazilian market, it may not be sufficient to produce and process foods internationally. Instead, efforts that localize agriculture and processing and that integrate local ingredients into production processes may be more effective. In particular, connecting these efforts to marketing and messaging plans will be key to connecting with eco-conscious consumers.

**Fuse sustainability and local solidarity messaging.** Job growth and collective success are also part of the promise of a more prosperous and resilient nation. Rather than develop messaging aimed specifically at sustainability or at patriotism, marketing and branding efforts should instead focus on more comprehensive efforts that tie consumer purchasing to economic and sustainability concerns. The fusion of these two values in messaging will likely be more powerful than either alone.

Image source: Groupon Brasil/Frutos do Brasil
Forecast 2: 

Discerning diets for a new generation

Over the coming decade, a new generation of young food experts will become the key public health and nutrition educators for their less educated parents and grandparents, guiding food choices for generations past and future. Many of the efforts to improve childhood nutrition are taking place in schools. National laws in Brazil now require that 30% of ingredients of school lunches come from family farms, and education programs teach children about the importance of fresh and organic foods, in an effort to counteract growing obesity and diabetes rates. While this younger generation will be influenced by what they learn in school, many of their food recommendations will also be shaped by a pre-existing cultural fixation on personal appearance. In gyms, beaches, and other places where young Brazilians work out and strut their stuff, they will feel even more pressure to look good.

The younger generation’s understandings of food are strikingly different from those of their parents. Living standards for many families are changing dramatically over the course of a single generation, as people who once experienced hunger are now trying to stave off obesity. Older generations struggling to navigate this new abundance of food will turn to their children to help them make sense of nutrition and health, making children and teenagers key decision-makers and health promoters within the family.

**INSIGHTS**

Beauty, health, and food will be blended together. Young people will have a stronger understanding of nutrition but will also seek food choices that improve physical appearance and well-being. As consumers draw conceptual links between food, beauty, and health, they will look for foods that both promote long-term health and have properties that affect aspects of physical appearance, such as weight and skin complexion.

Young and old will look for messages that appeal to the other. While children and teenagers will play a key role in shaping the opinions and understandings of their parents, parents will still control the purse strings. Many families will be looking for foods that have smart messages that appeal to both savvy, educated youngsters and the goals of their parents.
**ACTIONS:**

Use creative strategies to help with weight management. In light of the close connection between beauty and health, particularly among Brazilian youth, health foods will need to have strong connections to beauty, particularly weight control. The most natural strategy will involve recipe and nutrition reformulation to enhance both health and beauty, but other responses will focus on in-store design and other forms of presenting choices to connect people with foods that fit their needs. Regardless of method, strategies will need to have a high degree of honesty and consistency.

Make health messaging speak to the needs of the whole family. Because food purchasing decisions will often be shared among several family members, developing messaging and branding that appeals to the values and goals of different family members will be critical. Messages will need to address multiple health goals and appeal to varying degrees of health literacy, in unexpected combinations. Young, healthy children may be looking out for their older siblings or parents with chronic illnesses, and older family members may be looking out for the appearance as well as the health of their progeny.

**Brazilians Mandating Organic and Family-Farmed School Lunches**

**Description**

The Brazilian state of Paraná passed a law in early 2011 requiring that all school lunches be 100% organic and include a healthy complement of fruits and vegetables. This comes on the tail of a federal law that requires 30% of Brazilian school lunch ingredients to come from family farms, and that institutes educational programs to teach the value of smallholder agriculture to students.

**Relevance**

The school lunch program has become a key battleground in the fight over food values and choices since the recent release of a government report suggesting that Brazil leads the world in consumption of agrochemicals (including pesticides, herbicides, and chemical fertilizers). Thanks to educational programs and policy-making efforts to shape eating habits by decree, young Brazilians are finding themselves better informed on food issues than their parents are.
Brazil

Forecast 3:

New channels for new markets

Over the next ten years, dramatic changes will take place in how packaged foods reach Brazil’s much-heralded emerging middle class, from urban favelas to remote Amazonian communities. Food manufacturers, including multinationals and Brazil’s own domestic food production giants, will seek to increase profits by going straight to consumers—especially those just beginning to introduce packaged foods into their diets. They will do this through direct sales models that follow precedents in the cosmetics industry from Natura, Avon, and Amway. These models will use “micro-distributors” to offer packaged goods, often in multiple-item kits, to consumers at prices below those in supermarkets and other traditional retail channels. Direct sales vendors in Brazil are almost exclusively women. For some, it’s their family’s sole income stream, but others work in retail and other sectors for their primary source of income, and use their job-site as a place to recruit customers.

Another approach to the emerging Brazilian market will be found in innovative ideas for new types of retail outlets, including mobile outlets that can better connect with potential customers in remote communities. These new channels will depend on packaged food buyers valuing both convenience and novelty more than ever before, while not necessarily having convenient access to major retail outlets. With multiple wage-earners in the household, time for making food at home from scratch is less available; new channels will offer convenient products at prices families can afford. Although these families have been seeing advertisements and product placements for many of these products for more than a decade, they are only now beginning to have the purchasing power and physical access to make them part of their daily lives.

INSIGHTS

Peer networks will shape food purchasing behaviors. Purchasing through peer-to-peer sales and seeking advice through social networks means that consumers will be looking to friends and family for their decisions about packaged foods, effectively turning friends and family into food distributors and marketers. This practice will heighten the importance of social influence on how people make decisions about food and will blur the line between commercial transactions and social interactions.

Easy access will be a key component of convenience. Many Brazilians will be able to afford the cost of packaged foods but will find the time involved in getting to traditional retail outlets to be too burdensome. As a result, easy access to foods (whether fresh or packaged) will become as important as easy preparation in driving purchasing decisions around convenience foods.
**ACTIONS**

**Use multiple tools to cultivate consumer networks.** While peer-to-peer sales will create hyper-localized distribution networks, communications tools like mobile phones and social media will reduce the geographic barriers to peer-to-peer influence. Marketing and branding efforts will need to leverage social media as well as physical geography to engage consumers through peer networks.

**Design for small-scale distribution.** Food manufacturers can tailor packaging and formulation to the storage and marketing needs of direct sales vendors and other small-scale retailers. Having products and methods that facilitate smaller-scale distribution will help ensure that consumers have broad access to markets and retail channels.

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**Producer Nestlé**

**Circumventing Retailers**

**Description**

Aggressively moving where few global food manufacturers have gone before, Nestlé is bypassing supermarkets and traditional distribution channels by developing a strong direct sales program and branded retail outlets. Their direct sales catalog is one of the top distribution-related publications in Brazil, with offerings that enable individuals to create their own retail operations from home or alongside their existing workplaces (much like Natura’s and Avon’s cosmetics offerings). Another part of their strategy is Nestlé’s own highly branded supermarket barge, which stops for one day at each of 18 remote locations along the Pará and Xingu rivers; it sells smaller-sized packages of Nestlé’s foods to consumers, many of whom are having their first experiences with the brand.

**Relevance**

Rather than wait for traditional supply chains to make their way into Brazil’s favelas and the deepest reaches of the Amazon, Nestlé’s marketers are taking matters into their own hands. By controlling the distribution channel, they have the potential to offer lower-priced goods to consumers, and to get there ahead of local producers and retailers who don’t have the capital needed to reach these markets. From favelas to rainforests, Brazil’s economy is heating up dramatically, and many people will just be starting to have disposable income in the coming years; the taste experiences that Nestlé provides to these first-time consumers will undoubtedly make impressions that last for decades.

*Image source: Nestlé*
Which forecast or forecasts are the most potentially disruptive to the ways your target or potential consumers make food choices? Will they buy food differently? Eat radically different diets? What aspects of consumer behavior are similar to today? What aspects are radically different?

In light of these shifting consumer behaviors, describe any potential threats or opportunities that these forecasts create for your long-range initiatives.
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Consumers in Europe are in for a decade of conflict between cultural ideals and the reality of resource and infrastructure limitations. While consumers will seek sincerity in food—be it cultural authenticity, local sourcing or environmental stewardship—they will be looking for people and companies to guide them through the accompanying restrictions. A booming, diverse population of seniors—with their own food access and taste needs—will pose additional challenges to bringing consumption into alignment with values.
Forecast 1: Quality through sincerity

Over the next decade, Europeans will have access to layers of real information about their food, generated by integrated monitoring and data sensing systems operating from both the top down and the bottom up. These flows of information will influence people’s notions of what constitutes high-quality, authentic, and ethical foods. These notions will shift based on the additional data available about food choices, as consumers base their purchasing decisions less on a food’s substance or national origin and more on the process it undergoes from farm to fork. Companies’ attempts to wrap narratives around these processes will be subject to verification by consumers, heightening the importance of sincerity as an element of people’s decisions about food.

The importance of a product’s origin has become central to decision making by European consumers concerned about quality, authenticity, and environmental ethics, with localism as the credo of both food-mile-conscious citizens and national interests guarding privileges based on country-of-origin laws. The push and pull of nationalism and unionism in the European Union will settle (at least in matters of food) into a solid middle ground of regionalism—for example, Nordic and Mediterranean rather than Norway and Greece. And again, process-based concerns will emerge out of this churn of food values, whether concern for the cultural authenticity of Halal or Kosher or for the environmental authenticity of sustainable food gathering and manufacturing.

The gap between convenience and quality will be closed. Even “convenience” foods will be well made and sincerely transparent, through gourmet-level vending machines and sophisticated automated kiosks. Consumers will achieve efficiency by continuing to reduce time and effort invested in shopping, cooking, and eating, or by considering these activities efficient ways to reap the combined benefits of relaxation, social connection, and the expression of values.

Skills and trust will be unevenly distributed. A resurgence of efforts to cook at home for ensured authenticity will coexist with persistent de-skilling of home and food service kitchens through 3D food printers and robotic chefs. Sharp discrepancies will evolve between ideologies and actual food choices, and food fads will abound as consumers work to make sense of new information flows. To the extent that previously undisclosed processing practices may be exposed, mistrust and backlash will ebb and flow around attempts at sincerity.
**ACTIONS**

**Tell authentic stories.** Food should tell the story of its maker’s efforts to achieve quality and authenticity, for instance by emphasizing the limited processing of artisan goods or the authenticity of mainstreamed ethnic offerings. There may be space for cultural storytelling in processing, packaging, and distribution decisions, not just in conventional PR and marketing.

**Emphasize the social benefit of food engagement.** Companies’ marketing efforts can prompt families to look for hidden value in the everyday activity of eating, revitalizing interest in family connectedness through food. Also, renewed government and local support for healthy eating initiatives for youth will help socialize children into good food habits. Pop-up and home-based restaurants, home cooks selling extra servings, and environments that integrate cooking, learning, and retail are models that strive to maximize meaningfulness in both relaxing food experiences and hurried ones.

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**Eat-aly’s How-to-Cook-It Approach**

**Description**

Eat-aly is an Italian chain of high-end food megastores that are part supermarket, part restaurant, and part cooking school. Customers can eat a meal, learn how to cook it, and then buy all the ingredients that went into making it. With fishmongers, meat butchers, and even produce “butchers” on hand, customers can buy many of the ingredients already prepped for easy cooking later. Some locations also offer classes and seminars on cooking and food.

**Relevance**

Eat-aly’s brand is built on authenticity. For customers who are looking for convenience but are wary of heavy processing, the in-store ingredient preparation provides a bold alternative to fast food and instant food. Transparency is not an issue, as the preparation is done in front of the customers’ eyes. The food served in Eat-aly’s delis and restaurants is similarly transparent, as the ingredients and cooking methods are actively shared with customers. With branches as large as 36,500 square feet, and locations throughout Italy, Japan, and now one in New York, Eat-aly has proven that sincerity is a viable business strategy.

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Image source: Flickr user noebse
Forecast 2:

Coping with a sustainability transition

The tension between commitments to sustainable production, consumption, and waste disposal and fundamentally unsustainable diets will crystallize in the next decade. Across Europe, the impacts of unsustainable food systems will be felt through ecosystem degradation, fisheries collapse, and difficulty in meeting food demands. The effects in people’s everyday lives will include shifting and constrained protein choices, concern over portions and packaging, and greater attention to minimizing waste and maximizing utility. The ultimate result will be smaller portion sizes for individuals and rationing of scarce foods among households. Even as pressure for efficiency is kept up, people will demand and invent ways to feed waste back into loops of composting, cellulose-plastic processing, and waste-to-energy efforts by both governments and companies.

Europeans will find their uncompromising demands for quality disrupted by a sudden scarcity of familiar foods. Transitions in nutrition around the world will make it difficult for Europe to procure enough fish and meat from overseas to satisfy even a slowly dwindling demand; focus will turn to stewarding European livestock operations more sustainably and reinventing aquaculture with sustainable techniques. Food celebrities and eco-gastronomists will race to promote bycatch, freshwater, and vegetarian-grown fish and to push the transformation of meat substitutes into more visually appealing and tastier products.

INSIGHTS

Ethical contradictions will become more acute. As sustainability becomes an increasingly important value filter, European consumers will be confronted with making an increasingly large number of ethical trade-offs in decision-making. For example, people will be forced to reconcile regional conservation with local self-sufficiency, city-raised meat with public health concerns, and novel alternatives with deep-seated distrust of cloning and genetic modification. Traditions of gathering wild food will be disrupted by concerns over contamination by polluted water and soil.

People will be looking for allies. From learning to cook and eat new things to finding the best ways to dispose of food waste and packaging, consumers will be constantly on the lookout for tips, allies, and channels that make momentous changes easier to handle. Self-motivated consumer groups will take the lead in educating their peers, but resilient food companies and retailers who survive these transitions can participate in a constructive way by providing in-store resources, doorstep deliveries, demonstrations, and cradle-to-cradle resource management to enable sustainable eating.
Love Food Hate Waste
Guiding Consumers

Description
Sponsored by Scottish policy makers and celebrity chefs, Love Food Hate Waste is a campaign, supported by a mobile app, that aims to retrain people’s expectations about meal portions as they shop and cook, and to mix a fun element into avoiding wasting leftovers and ingredients. A food waste “blender” asks users to enter their leftover ingredients and suggests recipes accordingly, and a shake-to-get-results recipe generator injects serendipity while cutting through the complex search criteria for finding appropriate recipes.

Relevance
Love Food Hate Waste taps into people’s uncertainty about how cooking basics translate into eventual portion sizes, and also attempts to resolve their emotional conflicts around restraining appetite and controlling food waste. By providing a portal to creative reuse recipes, celebrity cheerleading, and personal cooking discoveries, the Love Food Hate Waste app acts as a guide for consumers between the market and the kitchen, showing the many ways food can return to the table rather than go into the waste bin.

ACtIONS

Offer multisensory transitions. People’s expectations for taste, visual familiarity, and enjoyment in meat and fish alternatives will need to be met in the coming decade. Greater quality and diversity of flavors will help, but there will also be a market for more multisensory approaches, such as olfactory supplements (alongside products or embedded in utensils and packaging) and even augmented reality (AR) overlays that change the appearance of foods. Although AR experiences and the promise of familiarity will be persuasive in this future, beware of backlash if the gap between reality and perception becomes too jarring.

Reevaluate packaging options. Buy-once-and-discard-forever packaging will be an unattractive feature for a growing number of European consumers. Alternatives to conventional models in this future environment may include refilling stations for reusable containers, packaging that can be “upcycled” into new products like tools and clothing, and packaging rented to consumers by retailers.

Image source: www.wasteawarelovefood.org.uk/
Forecast 3: Universal retail design

By 2020, 20% of the European population is projected to be age 65 or older, and researchers, marketers, and designers in Europe are starting to recognize this as an opportune market. Over the next decade, this interest will contend with nuances of differences among the elderly, including diversity of ethnic background and cultural exposure, different needs at different ages, and inequality of income and financial stability. The graying population will expect and demand food and retail experiences that cater to their needs. Some of the issues will relate to physical design: the design of packaging, shelving, and labeling to enable “universal access” as pioneered by the disability community. Other issues will concern molecular design: product formulations for health benefits, gentle textures, and strong flavors. Still others will involve social design, affecting how consumers interact with each other and with store staff.

In other words, a new decision-making context for older people in Europe will make their shopping experiences smoother and foods will be marketed to the needs of different ages in a much more nuanced way. Furthermore, technology-savvy elders will fuel the success of online retail and doorstep delivery services: Indeed, shortages of younger Europeans will make such schemes more appealing than ever to marketers, who will enlist migrants and robots to work behind the scenes. Growing economic inequality between consumers with ample resources and those hanging onto struggling pension systems will give rise to innovations in food security, such as pay-what-you-can food charities. Peer-to-peer experiments among older consumers will become common strategies for improving food security, as will models that link generations together for sharing food knowledge and food-purchasing activities.

INSIGHTS

Expectations of elders will become more diverse. Surrounded by offerings and messaging directed at them, older Europeans will become more discerning, choosing the products and experiences that best cater to their dignity and desires. The aging population will be more ethnically diverse and will have had greater exposure than their predecessors to flavors and products at home and through travel. They will also have diverse lifestyles, with some having more chronic health conditions, more physical activity, or more active parenting at older ages.

People will look for health benefits in more places. In light of their growing number of health conditions and personal preferences, consumers will be looking for a more nuanced set of health benefits, both in the contents of foods and in the social and psychological aspects of retail surroundings. Professional guidance roles, such as food pharmacists who match prescriptions with dietary regimens, will open up, with consumers looking for a generally higher level of support and assistance.
**ACTIONS**

**Partner to meet the needs of consumers throughout their life stages.** The most effective actions in this future will involve different companies, grassroots groups, and individuals working together to understand the needs of different shoppers as they age. Combining efforts to understand both the physical and social needs of aging consumers on a granular level will result in better-informed actions and greater returns on all sides.

**Assess needs for automation and service development.** Having a universal retail design calls for technology in some cases and well-informed service people in others. Be cautious when examining automation options, as many kinds of consumer-facing automation will fall flat in this future. It will be crucial to have metrics to assess the well-being impacts of different strategies, understanding not only the ecosystem of retail services and experiences but also the health and cohesion of the surrounding community.

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**Generations Market Catering to Senior Customers**

**Description**
The Generations Market grocery store (developed by Kaiser’s Tengelmann, part of the Tengelmann Group in Germany) is designed specifically to give seniors a comfortable, appealing shopping experience. Its parking lot has extra-wide parking spots close to the store. Aisles are wide as well, with signs that use illustrations to identify the products in the aisles. Shelves are lower and floors are skid-resistant. Price labels are large, and there are even magnifying glasses to make it easier for seniors to read product labels.

**Relevance**
Generations Market has succeeded by recognizing the emerging senior population and tailoring the shopping experience to them at every level. The result has been a 25% increase above expected figures and reports of happy, long-time customers. Generations Market illustrates that this market will be key and will require thinking beyond marketing and product formulation into retail design.

*Image source: Frank Vincentz*
Which forecast or forecasts are the most potentially disruptive to the ways your target or potential consumers make food choices? Will they buy food differently? Eat radically different diets? What aspects of consumer behavior are similar to today? What aspects are radically different?

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For consumers in China, food choices will continue to be fraught with anxiety. Fattening foreign foods can lead to obesity, which hurts one’s chances for advancement in society, but domestically produced food could be tainted and make one sick—or worse. Making the correct food choices can mean the difference between success and failure, life and death. And due to the one-child policy, stakes are especially high for parents of young children. But the graveness of these choices does not mean food consumption will be joyless—fun, innovative food practices, both home-grown and international, will gain traction in the coming decade. 🌟
Forecast 1:

Eating for success

Over the next decade, people of all generations in China will be eating not only for nourishment, physical health, and enjoyment but also for success in their future endeavors. For elders, success will mean continued tweaking of traditional dietary regimens for longevity. For young people, it will mean eating for appearance and advancement. Young women will face the unique challenge of trying to optimize their diet for reproductive health. And for parents of a school-aged children, it will mean promoting their child’s cognitive capacities and keeping the child’s weight down and help ensure agility. China’s one-child policy, by drastically altering the proportion of elders to young people, links the future success of an entire family to the success of the child. Top-down efforts to mitigate the impact of dietary transitions on the country will be reflected in the health and appearance of young people. For example, there are current rules in the educational system, in which excessive weight negatively impacts advancement in schools.

The threat of ecological collapses as barriers to collective success already weighs heavily on the minds of many, and this concern will only become more intense and pervasive. A strong and influential connection between everyday actions and long-term success will persist. To achieve their goals, people will turn to combinations of traditional wisdom and modern products: drinking traditional teas but with sugar substitutes; restricting children’s diets while also sending them to “fat camps” for weight loss; and eating traditional local foods that are also sustainable.

INSIGHTS

Fattening foods generate backlash. In 2005, Chinese urbanites consumed 35% of their calories from fat (5% over the recommendations of the World Health Organization), but in the coming decade there will be a backlash against foods that are seen as fattening for children or adults. As a result, people will struggle through a difficult landscape of food fads, as well as double standards whereby perceived alignment with future goals is as important as actual nutritional value.

Food choices become an increasing source of anxiety. Along with the growing prevalence of diet-related diseases such as diabetes and hypertension, eating disorders and body image anxieties will increase across genders among children and adolescents. These personal health anxieties will be further exacerbated by ecological anxieties emerging from pollution, water crises, and other major environmental challenges. For increasingly stressed consumers, foods that connect to long-term success will offer a form of emotional relief.
**ACTIONS**

*Tie healthful eating to successful living.* Healthful and beneficial options will stand out among a plethora of western and domestic foods that were often high-sugar and high-fat in the past. Presenting the beneficial options with suggestions of complementary food and lifestyle choices will resonate with the ethos of experimentation and drive for success in the coming decade. Given the low-trust environment that will persist around food choices in the future, it’s important that the proclaimed benefits be genuine.

*Connect sustainability and personal health.* As Chinese cities continue to grow and have greater difficulty meeting their resource needs, marketing efforts should be consistent with people’s desire to align their personal future success with ecologically viable and resilient food choices. While in the short term these alignments may be seen as trade-offs, in the longer term it should be clear that they’re necessary and valuable, in view of the scale and impact of environmental issues on people’s everyday lives.

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**Description**

China’s largest beverage company, Wahaha, plans to introduce a range of beverage and food products in the coming years that focus on health benefits and illness-reducing qualities. Wahaha founder and CEO Zong Qinghou told Forbes in 2010, “Looking ahead, the living standard of people in China is rising. But many people find themselves with illnesses as they become successful: higher blood pressure, diabetes. So today people are paying more attention to their health. In the future, we should meet the wishes of consumers to have beverages that are good for their health.”

**Relevance**

Wahaha’s move is angling away from production of high-sugar sodas toward a focus on promoting health through functional offerings. The company has already had success with its lines of fortified dairy products. Consistent with its leadership in the industry, the company will likely do well with their healthful new products, with the tipping point being the preponderance of lifestyle diseases, such as high blood pressure and diabetes.
Forecast 2:

**Trust for sale**

Revelations of the contamination of domestic Chinese foods—currently frequent, if not monthly, occurrences—will persist, fueling concerns that continue to rearrange consumers’ cost-quality equation (for those who can afford such adjustments). Journalists’ and citizens’ exposés of unsafe practices will motivate greater vigilance, especially among parents and parents-to-be. Children will be afforded even more exclusive bubbles of safety—verifiable non-toxicity in their food and all the products they touch—even at the expense of other family members’ well-being. Those who cannot afford constant vigilance and adjustments will react by avoiding food products and retailers at the first sign of harmful developments.

There is little faith that the incremental and reactive regulations of the government will, over the next decade, be able to keep up with the myriad schemes that yield profit at the expense of causing illness in other people. Instead, grassroots efforts to quickly expose harmful practices will be aided by increased prevalence of mobile social technologies and a renewed connection between patriotism and helping others. Safety screenings in retail settings, and even in the home, will eventually become standard practice. But even as consumers grow more adept at screening foods for their own protection, the price of trust is unlikely to go down.

**INSIGHTS**

**Imports will offer a measure of trust.** With trust in government—even in certifications like “organic” or “green” food—so low, people will look more to imports for verifiable safety. In fact, some Chinese manufacturers of baby food have begun to move their factories to neighboring countries to be able to legitimately claim import status. Even as many Chinese city dwellers clamor for novelty, stable players on the food scene will become more attractive as they provide reliability through demonstrable adherence to global standards.

**Gaps persist between value shopping and safety.** The sense of willful ignorance and fatalism that pervades those who cannot pay top prices to feed their children and themselves reveals a deep need for affordable mechanisms of assurance. Cracking the shell of nihilism that surrounds those who can only afford to buy the cheapest products is one of the biggest challenges, and opportunities, of this future.
Supermarkets Going to the Source

Description
Carrefour and Walmart are steadily expanding their programs in China to purchase fresh fruits and vegetables directly from farmers and farmers cooperatives, in line with the government’s call to improve price stability and food safety. Carrefour signed an agreement in June 2011 to step up efforts to train primary producers in food safety and integration with the company’s supply chains. Domestic food retailers such as the Beijing Hualian Group are also pursuing this strategy.

Relevance
Farm-to-fork control is seen as the most effective way (if not the only way) to ensure the safety, quality, and freshness of food supplies. In the long term, expanding to buy directly from farmers could position retailers more favorably in the struggle for safety validation. Although research from Purdue University shows that government certifications currently carry more weight than third-party certifiers across several categories of food, including milk and pork, the role of direct supply may change this equation over the coming decade.

Actions

**Provide safety validation offerings.** The ability to verify the safety of a food choice, whether at home or in the store, would be a valuable offering for many Chinese citizens. Although vegetable sprays promising to wash away pesticides abound, devices that could screen for contaminants and verify the authenticity of plant and animal substances on a genetic level would find good markets among people looking for a measurable safety standard. Less costly efforts that make food origins and quality transparent will offer a means for reaching lower income consumers.

**Develop integrated, transparent supply chains.**
Having closely connected regional chains, with clear lines of communication for customer service and feedback, is vitally important. Still, many companies will find that the only way to ensure quality—and so the best way to build trust—is through proactive control of entire supply chains, creating direct relationships with primary suppliers. Using these integrated chains to increase transparency will offer additional opportunities to build trusting relationships with consumers.

Image source: Walmart
Forecast 3:

**Vanguard eating**

Many residents of Chinese cities will prove eager participants in the global trends toward temporary and ephemeral food channels, such as seasonal markets, organic agri-tourism, home delivery services, and pop-up restaurants. The quest for novelty and surprise has shaped the evolution of retail channels in China, from the growth of idiosyncratic organic farmers markets to the barrage of new choices in large-format food retail. The desire for surprise and entertainment will be met not just with an influx of new foods but also with novel food experiences, in which shopping and eating blend with art, creativity, and community activism. But beyond just reflecting cosmopolitan tastes for novelty, these trends will also resonate with traditional Chinese beliefs about seasonality and localism, and with traditional Chinese medicine’s edicts on healing with food.

People’s engagement with the process by which they get their food will develop even further as an avenue of self-expression. They will, for example, prefer eating sweet potato cakes rather than French fries, and will identify with the network of urban organic farms that provide the sweet potatoes. Artists and other citizens photo-blogging or otherwise tracking their quests, experiments, and discoveries will create a growing number of avant-garde food channels, closely mirroring global trends in pop-up shopping and dining.

**INSIGHTS**

- **Trends will proliferate with no lag time.** Younger Chinese city dwellers will adapt to global food trends with more speed, clarity, and passion. To the extent that many of these trends will validate traditional Chinese beliefs about food, nature, and healing, their expression will be distinctively local. But simultaneously in the very near future, global fads in diets, self-care, and entertainment eating will have no lag time before popping up in first-, second-, and even lower-tier Chinese cities.

- **Novelty must be meaningful.** To gain traction in this future, a trend, retail experiment, or other offering must include not only novel products but also meaningful experiences and stories about those products. Grounding new offerings in the evolving character of Chinese cities, in people’s desire for self-expression through mobile and social media, and yet still in traditional Chinese healing beliefs will help create novelty that is meaningful.
 ACTIONS

**Step up the seasonal game.** Seasonal offerings and even seasonal reformulations will have a stronger audience in China than in other countries. The depth to which seasonality is addressed can range from literally what grows in a season to the more subtle properties, rooted in the humoral traditions of balancing bodily fluids with the environment, that determine which foods are considered “heating” or “cooling” in Traditional Chinese Medicine.

**Support social exploration.** Although micro-bloggers in China are already sharing novel dishes and cooking adventures with both close networks of friends and large followings, there is room for further strengthening the connection between online and physical explorations of culinary expression. Social media strategies aimed at attracting groups that share similar health interests could help people who want to change their eating habits but are unsure where to start. Companies could host collective eating adventures, like the ones dating site Table for Six hosts in the United States but on a larger scale.

**Description**

Artist Emi Uemura, along with the organization Vitamin Creative Space, has hosted a number of art installations that bring people into closer contact with urban organic food producers and distributors. In November 2010, one such event, Country Fair, was based on the familiar institution of the farmers market but emphasized the potential of having more personal relationships between urban eaters and urban farmers. It also incorporated lectures and demonstrations about seasonal cooking and on-site composting.

**Relevance**

The artists are bringing global trends to Chinese cities points to the dissolution of lag time between trends in North America and Europe and those spreading among Chinese foodies. These will be seen in the future as businesses, art installations, and do-it-yourself project movements.
In light of these shifting consumer behaviors, describe any potential threats or opportunities that these forecasts create for your long-range initiatives.

Which forecast or forecasts are the most potentially disruptive to the ways your target or potential consumers make food choices? Will they buy food differently? Eat radically different diets? What aspects of consumer behavior are similar to today? What aspects are radically different?
**Consider concrete actions you could take to respond to these threats and opportunities.** Think about elements of consumer experience you could influence. Circle those that apply.

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In the coming decade, every aspect of food consumption will become extremely transparent. Consumers will have access to detailed information on the contents of their food, how it got to their plate, and whether they’re eating enough of it or too much. This information will make it easier for consumers to stick to their ideal diets and cut down or cut out impulse eating altogether. And while food consumption will increasingly be tied to the internet and machines, instead of isolating people from each other, it will strengthen existing connections between people and generate new ones.
Forecast 1:
The food sharing economy

While food consumption has always been a social activity in North America, emerging technologies and practices are turning a wide array of conventionally individual food-related activities into group experiences. Some of the most transformative shifts will stem from collaborative consumption practices, including food trading, shared spaces for growing and cooking food, crowd funding (money pooling), and cooperative ways to use idle capacity of goods and services. These practices are already enabling consumers to do everything from negotiating bulk discounts to aggregating enough adventurous eaters to consume unusual meals, like fish head tamarind curry. In some places, consumer groups are bypassing traditional retail channels altogether to find their foods, for instance through Community Supported Agriculture.

Over the next decade, the range of social tools for sharing foods will expand, and consumers will be connecting more and sharing the process of acquiring food. They will essentially remake traditional restaurants and supermarkets, and will use social networking to buy, sell, and swap meals and foodstuffs through peer-to-peer marketplaces. Consumers will also use real-time geolocation technologies to form ad hoc groups inside stores and restaurants to split bulk purchases, swap recipes, and find the best deals. Not only will these tools transform retail, but they will also reshape people’s social relationships around food.

**INSIGHTS**

**Consumers will co-create food retail and dining experiences.** As the act of shopping becomes a more social and connected experience, people will begin to actively design their food shopping and eating experiences. While initial social interactions may involve only swapping recipes and splitting ingredients, retail spaces will, over time, be redesigned to enable people to create their own in-store interactions and experiences. More experimental efforts will seek to turn consumers into micro-contributors and micro-producers. Attracting shoppers will involve enabling people to connect, contribute, and co-create food experiences before making purchasing decisions.

**Sharing will create new consumer networks.** The ability of individuals to connect and self-organize around food interests will further fragment traditional markets and create narrow niches of networked food interests. These niches will be able to demand more personalized products—whether experimental foods or foods produced according to specific values—and, although by themselves they may be small niches, they will collectively constitute a larger part of food consumption. As more people carry their social networks with them on their phones, the opinions of groups (family, friends, and others with common tastes or identities) will be that much more critical to evaluating food choices.
Forage Restaurant Using Backyard Ingredients

Description
Forage restaurant in Los Angeles takes “local” to a new level by sourcing some of its ingredients from the backyards of its customers. Contributing home growers receive no monetary compensation, but by donating produce from their gardens they sometimes get discounts and free food. More than that, they get to know that their excess produce, which might otherwise have gone to waste, will be enjoyed by others as part of a gourmet meal.

Relevance
The diners at Forage aren’t passive consumers, but rather contribute actively to the restaurant. Although they do so in an obvious way by donating ingredients, their contribution goes beyond the food alone. The Forage website shows photos and bios of the growers who donate produce, along with a list of what each one donates. This “Home Growers Circle” gives Forage an authentic character and the feeling of a collaborative community. This kind of sharing has existed for a long time in less formal settings, but Forage is an early example of how sharing will begin to reshape restaurants and transform other food choices.

ACTIONS

Design store experiences to facilitate exchange and co-creation. As social interactions around food purchases increase, consumers will expect stores to become hubs for meeting others, learning about new foods, or finding ways to share bargains and ingredients. Community bulletin boards may need to be more central and participatory, to better enable sharing of recipes and stories about foods’ origins. Redesigning store space to enable ad hoc peer-to-peer interactions will help facilitate exchanges and flows of people, while giving consumers opportunities to shape the shopping experience will be critical to building loyalty and trust.

Target consumer networks. It will no longer be sufficient to think of only target shoppers or households based on crude demographics. Instead, companies will need to find ways to align food products and eating and shopping experiences to the preferences of affinity-based groups of consumers. Understanding how food-related opinions spread through networks, and developing tools to cull useful information from these flows, will be critical to successful marketing and promotion.
Forecast 2:

**Segmented transparency**

Cheap sensors are enabling consumers in North America to learn unprecedented amounts about the foods they buy and consume—down to the geographic origins of a single piece of fruit, as well as the carbon and water costs of shipping the fruit—and are causing people to expect more than ever to know their place in the food web. Over the coming decade, third-party certifiers and food manufacturers will develop technologies beyond a code on a piece of fruit linking it to its farm of origin, to showing a virtual representation of the food’s entire journey and context. Consumers will come to expect food options to be transparently tracked and easily accessible for evaluation, and will want to use these metrics not only to understand how the food was produced and shipped but also to reduce waste and improve disposal efforts.

The carbon and water footprinting, labor inputs, food origins, and other new metrics will connect to broader consumer values but may be difficult for people to interpret. Consumers will prefer food choices for which information is not only complete and transparent but also easy to understand and easy to connect to their values. In addition, these metrics will form the basis of games and social efforts to compete over who has the most sustainable and healthiest position within the food web.

**INSIGHTS**

**Transparency will create consumer segments based on values.** As food options become more transparent through tracking, consumers will weigh trade-offs between different values—for example, whether to drive a mile to the farmers market or walk to a local grocery store that stocks the item. New consumer segments will form around efforts to buy foods that reflect the values that matter most to them, while minimizing negative impacts in other domains.

**Engagement and games will shape food choices.** As digital trails for food options emerge, consumers will gravitate toward using social tools to track and understand the impacts of their dietary choices. Over time, these social efforts will lead to informal challenges and also more formal games in competition over how long-term diets and disposal choices affect core values. To put it another way, the consumers themselves will become more transparent—which in the end will also affect their food choices.
** ACTIONS **

*Embed values in products.* As important as connecting food inputs to foods will be for reaching consumers, over the long run consumers will be looking for more novel strategies, involving packaging and disposal, to meet their goals. It will become critical for food manufacturers to develop products that are designed not just farm to fork, but from farm all the way to disposal, in ways that enable consumers to act on their values.

*Make product information engaging.* To better understand how their choices relate to their social and environmental values, consumers will be looking for food information that is easy to find and track. For food manufacturers, making information easy to access and integrate into a variety of electronic locations will be critical. For food retailers, viewing tracking and gaming as ways of engaging with shoppers will help build loyalty and enable customers to find products that they connect with emotionally.

** Description **

The San Francisco–based GreenGoose makes being responsible fun by turning everyday tasks into a game. Players can set goals for environmental responsibility or personal fitness with GreenGoose software and then use GreenGoose sensor devices to track their progress toward those goals. The sensors come in the form of small stickers and credit card–sized devices that can be attached to objects such as a toothbrush, fork, water bottle, water faucet, or bike, monitoring everything from the frequency of tooth brushing to the amount of water used. Players earn points and gain levels as they reach certain targets.

** Relevance **

Many see GreenGoose as the beginning of the “Internet of things,” in which most everyday objects are connected to the Internet with sensors. This technology will introduce a new level of transparency into people’s lives, enabling them to track what matters to them—such as how healthy or sustainable their eating habits are—and share that data with others. It’s also a powerful signal of “gamification,” or applying the principles of gaming to real-world tasks. Whether it’s competing with friends to see who can be the greenest or competing with oneself to gain points toward healthy eating, people will have easy, engaging ways to bring the fun of gaming to serious tasks. Platforms like GreenGoose will aid consumers in limiting their purchases to foods that fit their nutritional and ideological aspirations.

*Image source: www.greengoose.com*
Forecast 3: The quantified diet

Over the next decade, measurement tools and technologies emerging in North America will take much of the guesswork out of nutrition. Wearable and embedded sensor technologies will mean that individuals know not only how much they’ve eaten and when to stop but also the quality and variety of their nutritional inputs. Calories will be just one of a variety of metrics that people use to evaluate their food choices, as nutritional sciences, nutrigenomics, and other fields enable them to understand their nutritional needs in real time. These real-time metrics will both simplify the challenge of knowing what to eat and add a layer of nutritional literacy to food choices for many consumers.

Measuring food options will eventually enable people to offload much of the work of making decisions about what to buy and eat. Many choices that were once driven by guesswork and hunger pangs will instead be prescribed by algorithms and on smartphones. But the same time that these tools will remove some of the intellectual guesswork from nutrition, they will have little effect on people’s more visceral desires for taste and calories, leaving consumers seeking ways to maximize the emotional qualities of food within the narrow world of prescribed diets.

INSIGHTS

People will want more value from each food choice. Quantifying diets and calories will display the health impacts of mindless eating—and ultimately, in many instances, curb it. But as people begin to eat more within prescribed limits, they will want to make every eating occasion more meaningful and valuable. These limits will also shift consumers’ focus from individual eating occasions to managing choices over longer time periods and developing systems of eating. These emerging values will in turn spur food manufacturers and producers to seek ways to enhance the experiential value of food in a context of long-term nutrition.

Nutritional identities and affinities will emerge. As people achieve more granular understandings of how their personal health states and biological markers are affected by food choices, they will understand themselves better in terms of their biomarkers. Seeing the relationships between their bodies and food in much more nuanced terms, they will look for customized food options based on genetic predispositions and other biomarkers.
PhiloMetron Patch to Monitor Calories

Description
Currently in the prototype phase, the Calorie Measuring Patch from San Diego–based PhiloMetron is a wearable sensor that monitors the number of calories the user burns in a day, measuring calories consumed in a far more accurate way than is possible with current calorie counting methods. Results are sent to the user's smartphone, through a mobile app that keeps track of the caloric data and uses it to make exercise and diet recommendations.

Relevance
Much the way speed limit signs with a digital “Your Speed” display have proven effective at changing the behavior of motorists, sensors like the Calorie Measuring Patch will change people’s eating habits. The patch updates at 24-hour intervals, but later sensors will give more immediate feedback, and the sooner consumers get the information, the more likely they are to change their eating habits. As technology progresses, sensors will begin measuring things other than calories, giving consumers new ways to adjust their diet to meet personal nutritional needs. With smart sensors controlling eating occasions and limiting the range of ingredient formulations consumers will find acceptable, people will look at a food’s emotional qualities, or its role in a larger eating routine, when making choices.

ACTIONS

Explore a wide variety of approaches for value enhancement. As consumers become even more conscious of calories, finding different ways to enhance the perceived value of food while still reducing calories and unhealthy ingredients will be key to success. Using store design, packaging, and other tools to engage consumers will help increase their positive feelings about food while also promoting physical health.

Develop comprehensive solutions for nutritional needs. Affinity groups armed with information will seek comprehensive solutions for their food and nutritional needs over days and weeks, rather than just on a single eating occasion. Creating sets of healthy products and services that help take the guesswork out of complex nutritional choices will open up opportunities for developing new food products and building long-term brand equity and trust.
Which forecast or forecasts are the most potentially disruptive to the ways your target or potential consumers make food choices? Will they buy food differently? Eat radically different diets? What aspects of consumer behavior are similar to today? What aspects are radically different?

In light of these shifting consumer behaviors, describe any potential threats or opportunities that these forecasts create for your long-range initiatives.
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The forecasts in this report describe strategies that individuals, families, and networked groups of consumers will be employing over the next decade to make the most of their food choices in an increasingly complex food landscape. They’re intended to spark ideas about how to develop products, initiatives, and strategies that will connect with increasingly discerning consumers over the next decade.

In addition to serving as a tool to stimulate your thinking about how to respond to shifting consumer demands over the coming decade, this report is designed to work in tandem with the companion report *Food Choices in Flux: Scenarios for Alternative Futures of Food*. That report highlights four scenarios for the ways in which drivers ranging from climate and agricultural constraints to packaging and preparation technologies are creating multiple possible futures consumers will find themselves navigating. Considering how the forecasts of new consumer decisions and behaviors discussed in this report may manifest themselves differently under those different futures will help you analyze your action steps more systematically in order to develop more flexible long-term actions.