



Proteins for food and health:
Sustainable alternatives for future food seminar series



Colmar Brunton: Consumer Insights and Opportunities in Australia and Export Markets



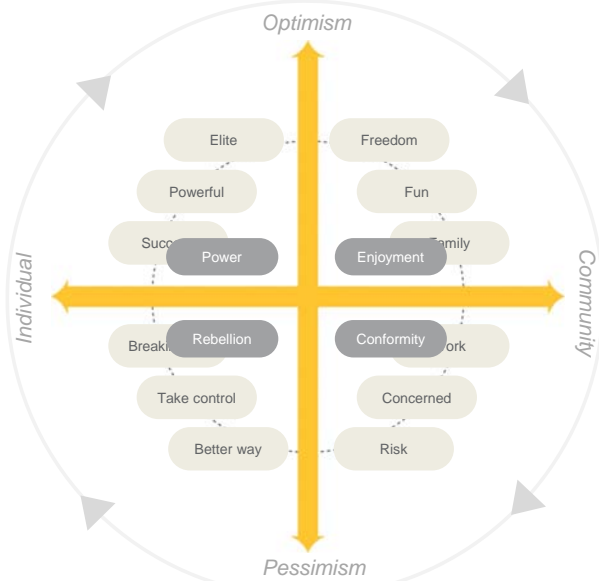
Insight & Opportunities

- Colmar Brunton has been observing consumer trends and applying this insight to FMCG innovation in Australia and beyond for 30 years.
- Knowing what trends are relevant and when to act is key to capitalising on opportunity.
- Knowing what consumer groups and what markets to target is also essential.



Tracking social values


- The Millennium Monitor is an academically-based model focused on evolving values.
- Values guide motivation that results in behaviour.
- As values change, so do the expectations and desires for particular types of products, comms and brands.



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Let's look at a cycle.

Values are the ability to make it happen



1980s-1990s

Values are the courage to change everything



1960s-1970s

Values are freedom to enjoy life in the community

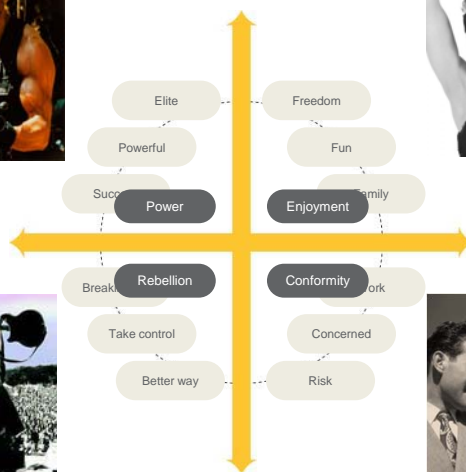


1920s-1930s

Security, predictability and everyone has a role



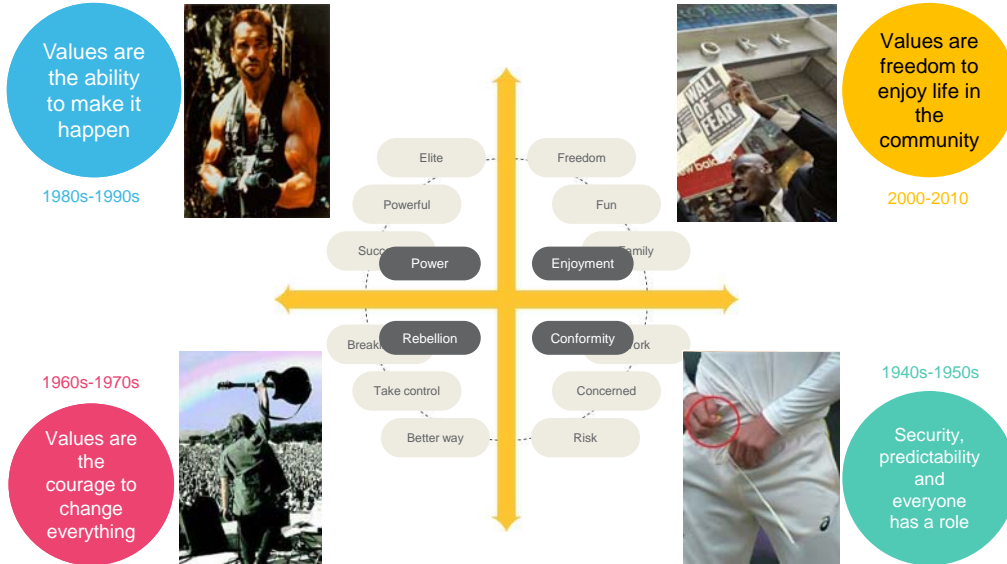
1940s-1950s



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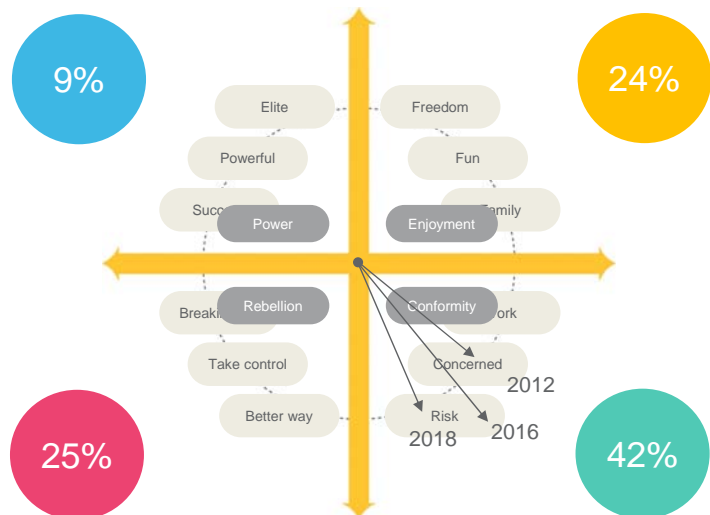
➤➤➤ Since 2000.



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Values are changing

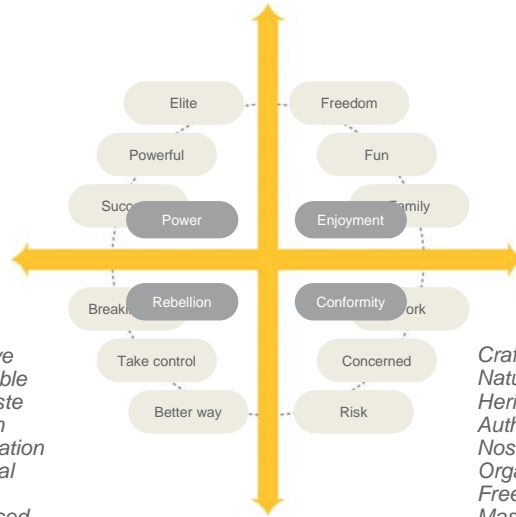
- The majority are still in Conformity but we have passed the tipping point, entering into a time of Radical Conformity
- There is an increase in the proportion of people who are moving into Rebellion
- In particular, the need to find “a Better Way” is increasing



Trends are evolving

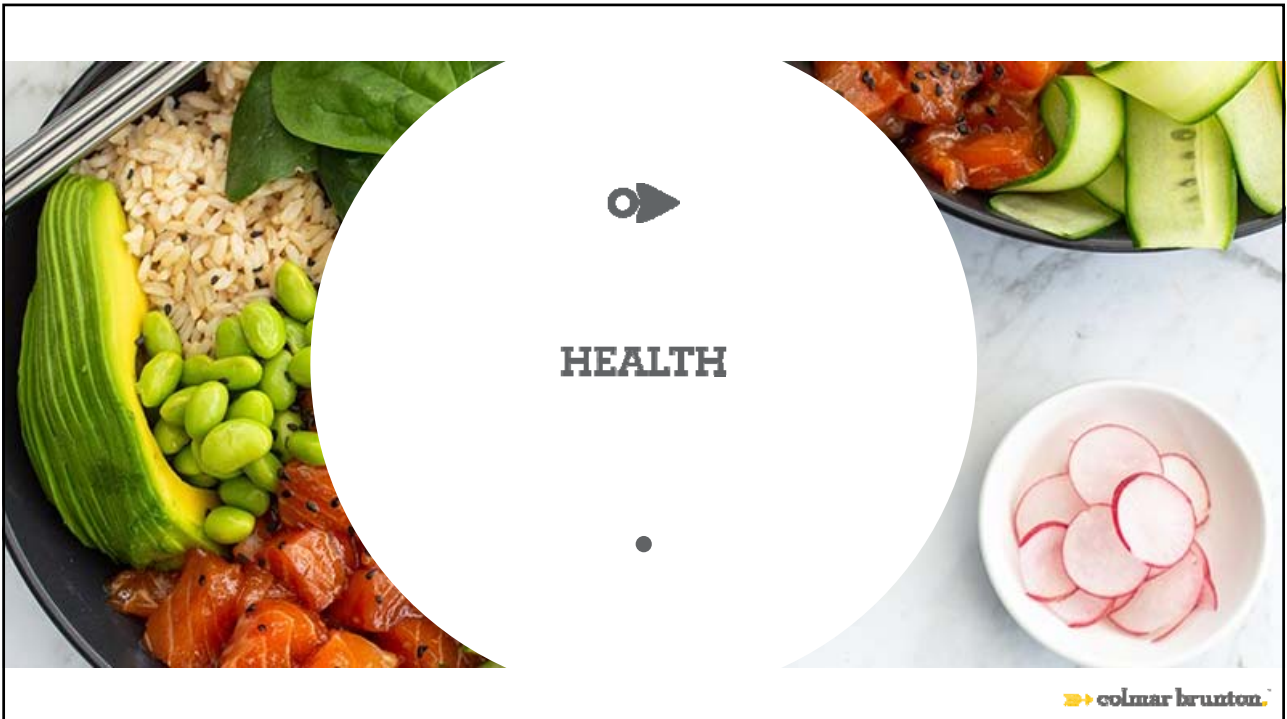
- As values move towards Rebellion, we are less interested in how a product is created and more interested in what it can do for us functionally.
- We are also looking for choices that empower us from an environmental perspective.
- Alternate sources of protein are innovations of interest in this space – protein that is good for you, good for the environment and affordable.

*Innovative
Sustainable
Less waste
Digestion
Detoxification
Functional
Fortified
Customised*



*Craft
Natural
Heritage
Authentic
Nostalgic
Organic
Free-Froms
Mass products*

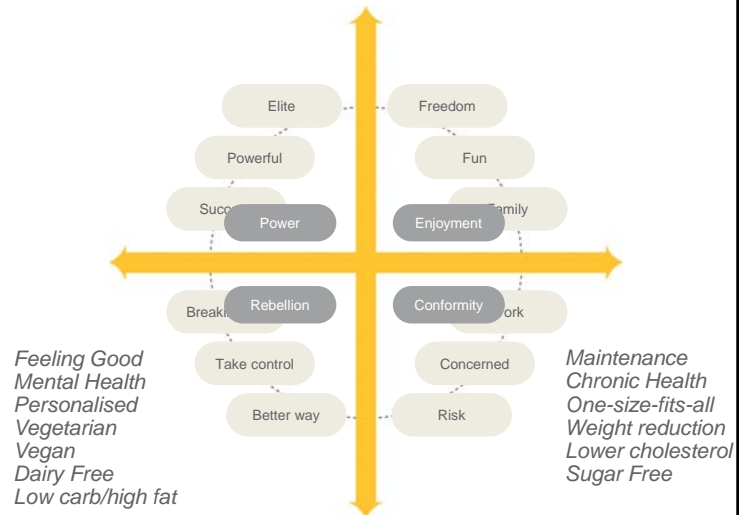
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Changing perceptions on health

- In Conformity we want to trust in traditional institutions. What's good for the community is good for us. More here consume traditional source of protein.
- In Rebellion, we no longer trust in traditional institutions but instead empower ourselves. This leads to a personalised approach. Fewer here consume traditional sources of protein.



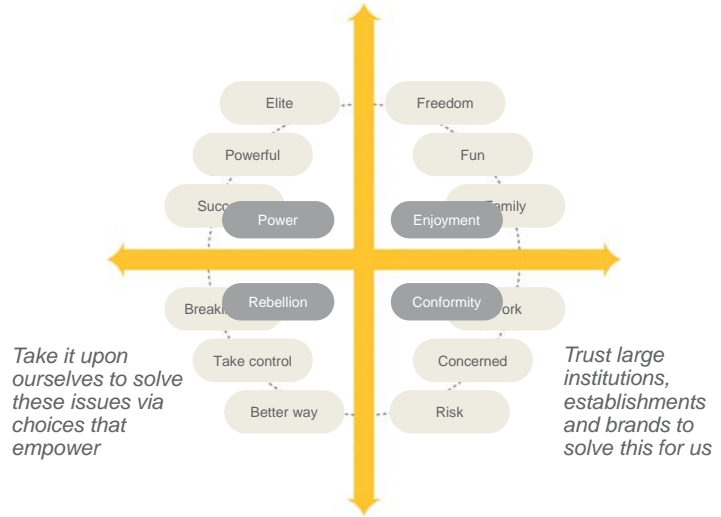
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THE ENVIRONMENT

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Environmentally Empowered

- Overall Australians do care about the environment – predominantly climate change, future energy supplies, water security, the sustainability of agriculture and dealing with waste.
- The difference between current Conformity and Future Rebellion is *who* is responsible to look after these issues.
- Future choices will increasingly aim to decrease climate change, bolster our energy and water supplies, increase the sustainability of agriculture and reduce our waste.



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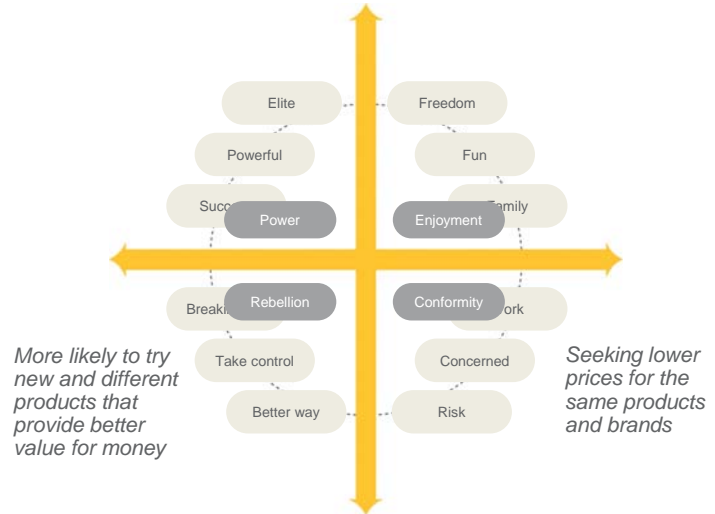
EXPENDITURE



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Monetary concerns are common

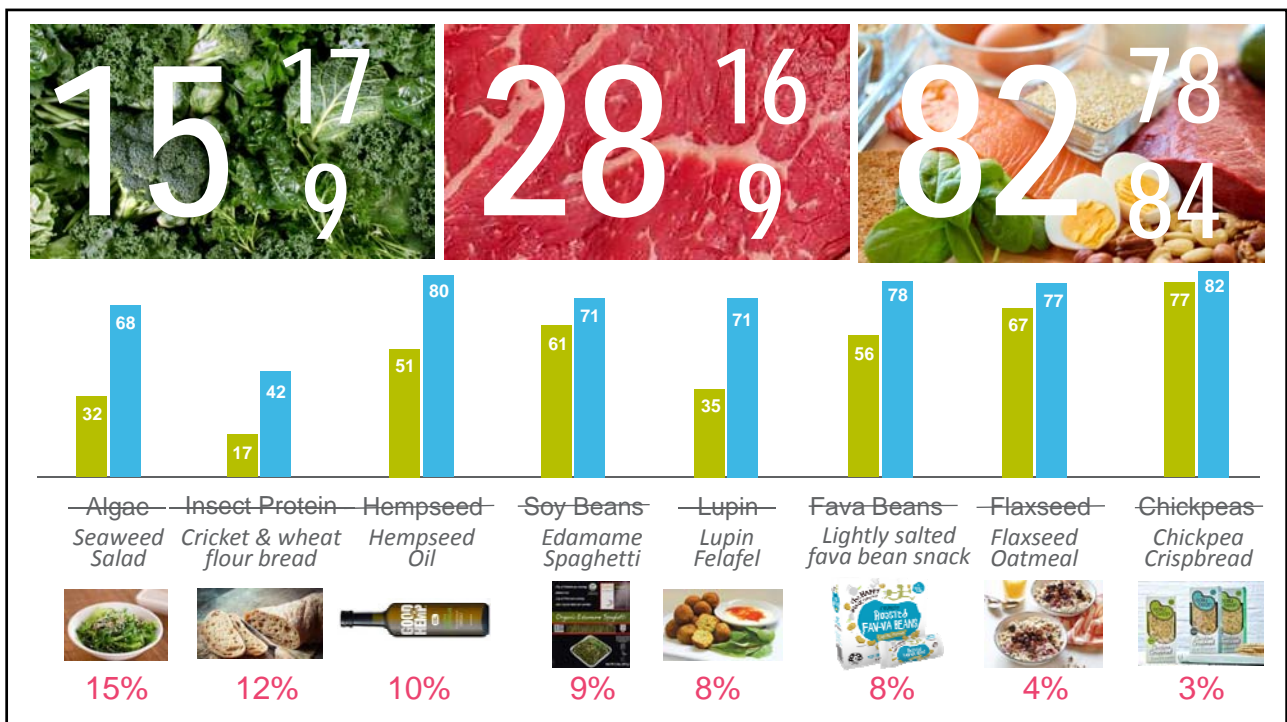
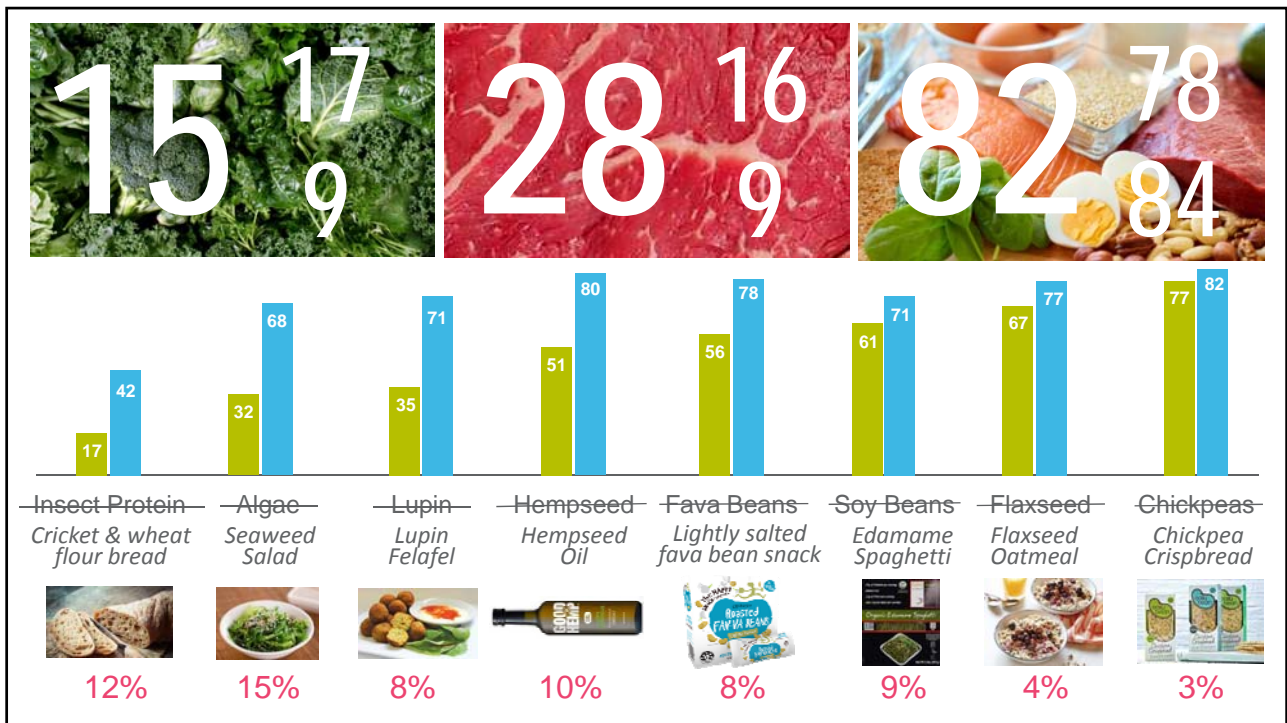
- Regardless of social values the most serious concern was the cost of living, followed by housing affordability.
- Less than half describe our financial situation as comfortable. Almost 60% of us actively manage our finances but only 35% are confident we will have enough money to live in retirement.
- This places stress on the choices we make on a daily basis and from a consumption perspective we can seek more affordable alternatives..



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BARRIERS & OPPORTUNITIES

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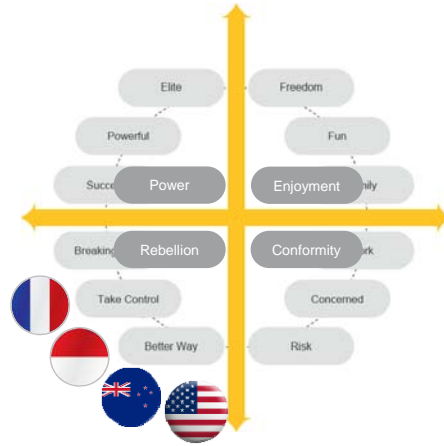
Other Markets in Conformity

- Many markets are in a time of Conformity where the individuals are seeking safety and familiarity and are less likely to try new things.
- For markets on a trajectory to Rebellion, the desire for sustainable protein alternatives may be starting to grow.
- The opportunity here is an educational one, highlighting how products meet these growing needs but especially one in building familiarity.



Translating to Markets in Rebellion

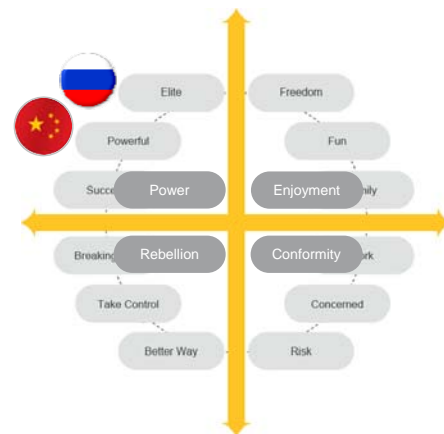
- Markets in Rebellion are generally more receptive to functional products and trying new things based on personalised health, environmental concerns and expenditure.
- As consumers seek a “better way” higher levels of knowledge are achieved.
- The opportunity here is to focus on accessibility, affordability and going deeper on the benefits as aligned to the values in this space.



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Translating to Markets in Power

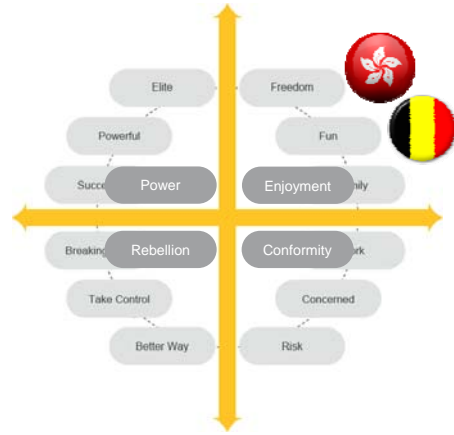
- The prevailing value in a Power market is the ability to make it happen.
- Markets in a time of Power do not prioritise the environment, define health as a personal advantage and glorify spending as a way to celebrate prosperity.
- From an export perspective, opportunities here are for super premium products associated with personal status and fortified health products associated with physical prowess.



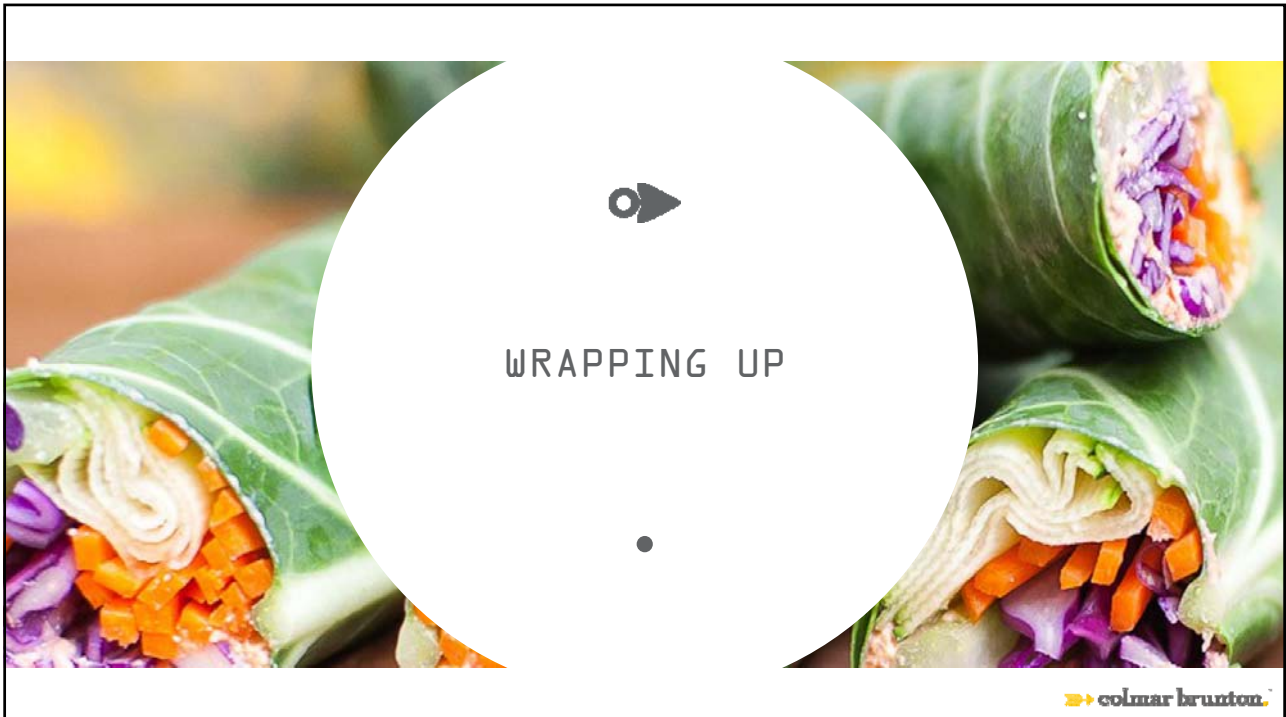
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Translating to Markets in Enjoyment

- In time, these markets will follow in the steps of Conformity into Rebellion, so building upon health, the environment and expenditure are not the ways in with these markets or consumers as yet.
- The values here are to enjoy life in the community, with family and friends.
- Novelty should be leveraged here, as should fun, interactive executions and opportunities to share products with others.



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Thanks.

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