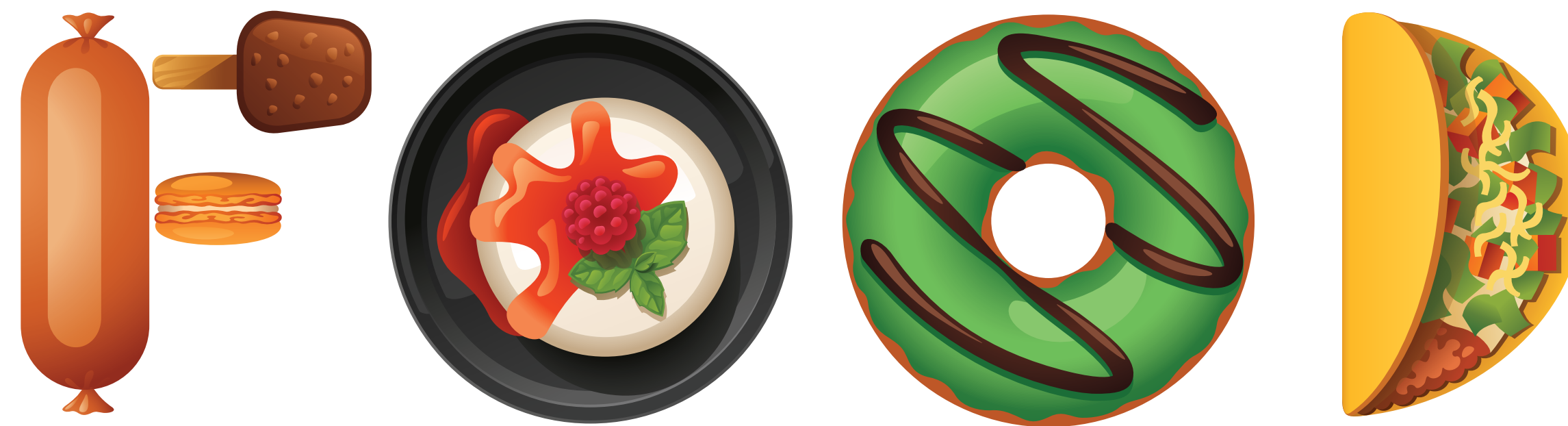


THE FUTURE OF



Live to Eat, Eat to Live

sparks & honey culture forecast



LIVE TO EAT, EAT TO LIVE

We are living in a time of unprecedented interest in food and food culture. Whole television networks are devoted to food. Chefs have become celebrities in their own right. Vine and YouTube have changed how we trade recipes. Home chefs follow food news and trends as if it were their job. This subculture of food devotees finds cultural significance in food and dining experiences as entertainment and meaning, and for Millennials, who are driving the growth in the food industry, you could even say that their very identities are bound up with being “foodies.”

At the same time, another group is interested in food, but for other reasons. This “back-to-basics” group is concerned about the quality of the food they’re getting, and whether or not it’s healthy for their bodies and the planet. Less pleasure-driven than self-described

foodies, these folks are dead serious about issues around GMO food and labeling, what a crop’s “water footprint” is, whether or not packaging can be recycled, and how we might maximize food’s impact on us while minimizing our impact on the planet.

Food has a basic function: it should sustain us, provide fuel, be safe, and be nutritious. Some of us ask of food that it be delicious, interesting, and pleasurable. Others, that it be authentic, wholesome, and sustainable. On another extreme end, there are those who don’t want to think about food at all, and ask that its delivery and even consumption be frictionless.

Between these cultural tensions we call Live to Eat versus Eat to Live, opportunity spaces abound in which a brand can innovate.





OUR BODIES,
OUR PLANET:
EAT TO LIVE

“Dietary pectin films can be designed for advanced food packaging applications where the packaging material itself promotes consumer health, supplementing diet with target micronutrients. Migration assays using arugula leaves confirmed that brucite-reinforced pectin films are capable of fortifying foods with dosages by migration.”

Luis Mattoso, Journal of Material Sciences and Engineering



SOYLENT, SMOOTHIES & MEAL SUBSTITUTES

13 DAYS

Average time Americans will spend cooking this year

- Statista

PURELY FUNCTIONAL FOOD

In contrast to those who identify themselves as foodies, time-crunched and eco-conscious folks are searching for quick and easy meal replacements. For them, food is purely functional: to provide fuel for their bodies and minds. The rise of smoothie diets and Soylent, a fully nutritious meal substitute, suggests consumers are willing to forgo the full food experience — including flavor — to simplify their dining rituals.



HIGH-TECH FOOD

\$11

Cost of lab grown hamburger patty, down from \$325K in 2013

- ABC News

SMART FOOD

We will soon be upgrading our food from nutrient-fortified to tech-fortified smart foods. In the future, “processed” foods will be associated with GMO-enhanced and suped-up foods with enriched nutrients, flavors, and microbes. Edible films made of pectin fortified with antimicrobial compounds and/or vitamins will help assure food safety and boost nutritional value.



WASTE POSITIVE

\$162 BN

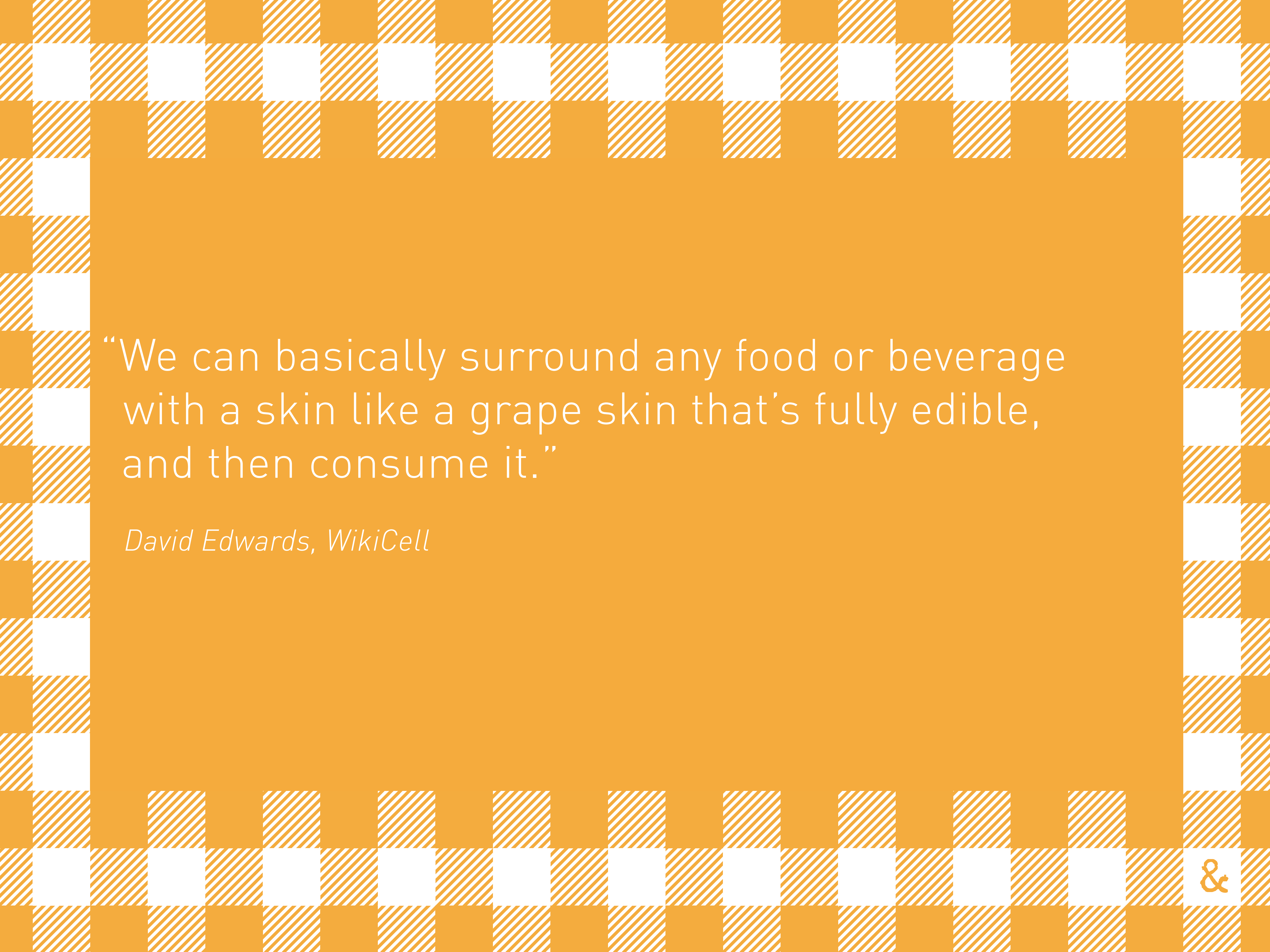
Annual value
of uneaten food
in the US
- *USDA*

31%

Food produced by
farmers that goes
uneaten
- *USDA*

ZERO IS HERO

Driven by increased eco-consciousness and rapid population growth, progressive countries like Denmark, France and Sweden are embracing a zero waste mindset. This “waste positive” movement is nothing short of a global recycling revolution. Innovators like Harvard bioengineer David Edwards is helping to reduce the impact of food production, packaging, retailing and recycling with his launch of WikiCell, which makes edible packaging for things like yogurt, coffee and alcoholic drinks.



“We can basically surround any food or beverage with a skin like a grape skin that’s fully edible, and then consume it.”

David Edwards, WikiCell



BUG APPETIT!

50%

of the protein market will be claimed by insects, algae and bioengineering by 2054

- *Lux Research, Inc.*

GREEN AND LIVING

A growing world population is driving the need for sustainable food sources. Insects and algae have been identified as alternative protein sources, as they require fewer resources to grow than traditional food crops and many cultures already view them as staples. Companies like Chapul, which produces protein bars with cricket flour, and New Wave Foods, which is developing “shrimp” from algae, are key innovators in this space.



URBAN VERTICAL FARMS

15X

Vertical farming
crop cycles versus
traditional farming
- *Farmed Here*

97%

Percentage decrease
of water usage
between vertical and
traditional farming
- *Farmed Here*

FARMING UP, NOT OUT

By 2050, the world population will contain 9.6 billion people; only 4% of the world is fertile enough for crops. As our cities grow higher to accommodate more people, farms will also be built vertically. Vertical farms are a highly efficient alternative as urbanization and over-population persist.

“Taking vertical urban indoor farming efficiency to the next level, a new automated plant coming to Japan will be staffed entirely by robots and produce 30,000 heads of lettuce daily.”

The Architecture Insight



WATER OBSESSION

30%

Percentage of US water footprint attributed to meat consumption
- Mekonnen and Hoekstra (2014)

LIQUID GOLD

The world's fresh water is about 2.5% of the world's total – and only a portion of that is drinkable. Inefficient agriculture or dependence on water-intensive foods and products make matters worse. Experts suggest focusing on “water-wise” crops and food choices.



“We need a movement favoring water-wise food choices and crops.”

Glen MacDonald, UCLA Institute Environment and Sustainability



IMPERFECT IS PERFECT

26%

Percentage of US produce
discarded due to strict cosmetic
standards of large grocers

- *EndFoodWaste.org*

UGLY IS IN

With mounting disdain for GMOs and food waste, there's a growing interest in ugly-yet-natural produce. Food activists, nutritionists, and entrepreneurs are urging grocers and consumers to consider "imperfect" fruits and vegetables.

From celebratory initiatives like Jordan Figueiredo's #WhatTheFork campaign to startups like Imperfect Produce — which delivers discounted boxes of funky-shaped produce — cosmetically-challenged is in.



“Anyone who has a backyard garden can understand that food grows in fun and funky ways — the notion that it is uniform is just a fallacy.”

Jonathan Bloom, American Wasteland



A MOVEABLE FEAST



“Investors poured more than \$730 million into food delivery firms like DoorDash, Instacart and Postmates from early 2014 through the first half of 2015, up more than 1,100 percent from the same period a year and a half ago.”

Mike Isaac, The New York Times



APP-TO-FORK THINKING

214

 Number of food delivery
 smartphone apps in the U.S.
 - AppCrawlR

FRICITIONLESS EATING

The time-starved are not going hungry, thanks to the development of smartphone apps that make it easy to order food or groceries. We're headed toward a future in which artificial intelligence will send dinner automatically, straight to your door, before you come home from work. Drivers of this trend include UberEATS, Amazon Fresh, and Yelp's Eat24.



DRONE DELIVERY DONE RIGHT

77%

U.S. consumers willing to pay up to \$20 extra for drone delivery if their order arrives within the hour

- Statista

MANNA FROM HEAVEN

There is huge interest in leveraging drones as future food delivery systems. From Amazon to Google X's Project Wing leading the research and investment charge, getting a pizza, beer or even champagne delivered to your doorstep in minutes after placing an order is already here in some cases and could soon become the norm in the next one to five years.

“It’s easy to imagine drones carrying relatively lightweight items like a package of cookies, six-pack of beer, or small box of pizza.”

Ben Popper, Business Editor, Verge



500

Hosts across 80 cities are willing to let you stop by for dinner while you're traveling

- *Bonappetour.com*

DOGGY BAG IT

New food experiences are a big part of the sharing economy, from on-demand chefs catering to your every food desire, to planning your meals in locals' homes while traveling. If sharing a meal with strangers isn't your thing, you can share your leftovers with peer-to-peer food sharing networks. As consciousness of food waste and demand for food exploration increase, the meal sharing economy will grow.

MEAL SHARING ECONOMY

“More than 7,000 people have signed up to take part in a service that shares thousands of tasty, home-cooked meals with their neighbors who need it most.”

Casserole Club





BETTER LIVING
THROUGH FOOD
LIVE TO EAT



“We’re in the realm of passion, we’re in the realm of conviction. In that regard, food is not entertainment like we often think... it’s more like religion.”

Mike Thelin, TEDxPortland



I EAT, THEREFORE I AM

3.9%

.....
Increase in dining out spending by the wealthiest top 10% since 2008 (\$53.9 billion)

- *YouGov and Time Inc.*

87%

.....
Percentage of millennials who will “splurge on a nice meal, even when money is tight”

- *Restaurant Marketing Labs*

FOOD AS PLEASURE

Today’s consumer is driven by a desire to gain experiences through food. For them, food is more than sustenance; it is a source of pleasure, cultural awakening, and even identity. Over the next five years, “dining out” will become a growing category, according to Mintel. For people who live to eat, dining is core to a life well lived.



TWO GREAT TASTES THAT
TASTE GREAT TOGETHER

\$5000

Scalpers' asking price for a
20-piece order during peak
Cronut (regularly \$100)

- *The New York Times*

UNEXPECTED COMBINATIONS

To satisfy consumers' desire for the novel and Instagrammable, restaurateurs continue to push mashup boundaries to stand out in a food-porn saturated social media landscape. Even mass-produced food mashups are getting into the game, like Oreo's Filled Cupcake and homemade pizza waffles.



EMOTIONAL EATING

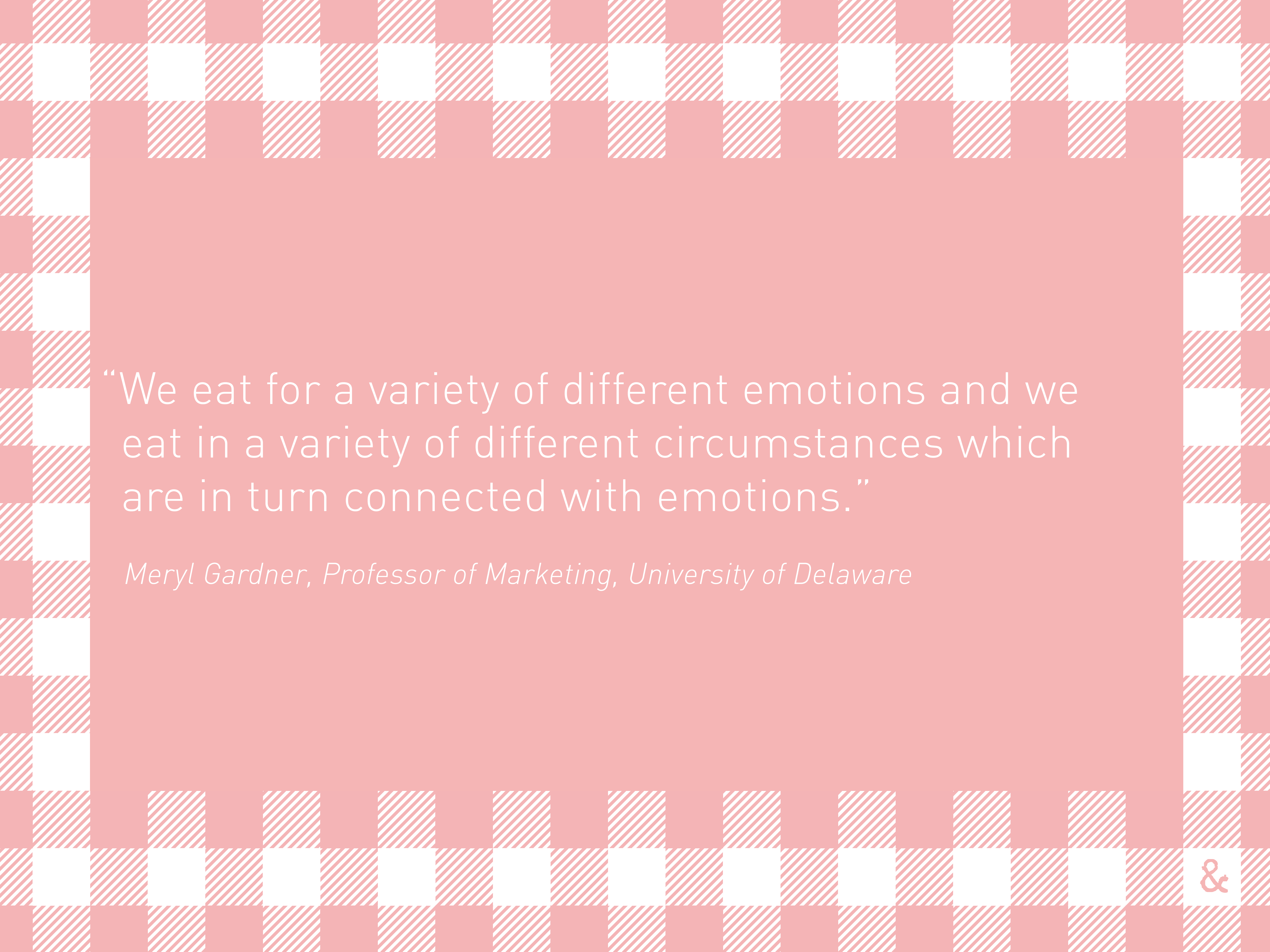
1.5 OZ

Volume of polyphenol-rich chocolate drink ingested prior to participants reporting feeling “calmer and more content”

- *Journal of Psychopharmacology*

MOOD FOOD

The neuroscience of food is a new frontier, as researchers study how foods can influence, induce and prevent certain moods. REBBL is a Berkeley-based functional drink company that promises to help people combat stress and enhance mood with adaptogenic herbs like ginseng. Azrhel Frost of CH Distillery & Cocktail Bar has a weekly event called “Cocktails Have Feelings Too,” in which drinks are made to match or affect emotions. And British ice-cream makers, “Licktators,” created “Vice Cream,” ice cream that is supposed to be a female aphrodisiac. As mood foods become more mainstream, we could see tasting menus focusing on an emotion rather than ingredients.



“We eat for a variety of different emotions and we eat in a variety of different circumstances which are in turn connected with emotions.”

Meryl Gardner, Professor of Marketing, University of Delaware



COOKING WITH HERB

4.8 MILLION

Edible marijuana products sold
across Colorado in 2014

- *Colorado Marijuana
Enforcement Division*

CANNABIS COOKING

Changing marijuana regulations are inspiring people to experiment with marijuana as a cooking ingredient. “Herb: Mastering the Art of Cooking with Cannabis” and “The Stoner’s Cookbook” encourage people to make Canna Gummies and Triple Baked Cannabis Potatoes. Marijuana as a cooking ingredient is not just for “stoners”; It’s also being embraced by high-cuisine and the artisanal movement.



EXTRASENSORY TITILLATION

38%

.....
Respondents who thought coffee in a red mug was the warmest, compared to yellow (28%), green (20%), and blue (13%)

- *Guéguen & Jacob*

FEAST FOR THE SENSES

Taste, smell, and texture are the dominant sensorial cues that shape typical meals. But food innovators are increasingly experimenting with audio and visual experiences, incorporating music pairings, video stimuli with Oculus Rift, and atypical dining environments to alter the way people experience food.



“Sound is the forgotten flavor sense. What we hear has a much bigger influence on taste than any of us realize.”

Charles Spence, Experimental Psychology Professor, Oxford University



**‘BODY FOOD’
THE ULTIMATE IN ORGANIC**

12%

Percentage of Chinese high-net-worth individuals who view ovine placenta as a top health food

- Statista

4000

Number of placentas prepared for ingestion since 2009 by IPEN, a UK-based placenta prep collective

- Mintpress

HUMAN HARVESTS

We have been through so many cycles of food trends, but this one circles back to the body itself. From Bompas and Parr, food artists who hosted a workshop on turning your tears into potable bitters, to Rogue Brewery, which created beer from their chief brewer’s beard yeast, to the Licktators who create ice cream made of real breast milk, repurposing the body’s natural fluids and bacteria to create food — while still niche — is becoming a “thing.” With the rise of experiential dining, people will be looking for new ways to be a part of their dining experience — literally.



“Breast Milk Ice-cream is the ultimate organic ice cream...it’s free-range, freshly squeezed and totally natural. Perfect for any prince or princess.”

The Licktators



PLAY WITH YOUR FOOD


\$6.9 BILLION

.....
Sales across the 3D printer market (of which 3D-printed food is a part) by 2018, up from \$789 million in 2015

- Gartner

3D PRINTED FOOD

Will the world of 3D printed food cartridges and software replace kitchenware and recipes? Largely driven by a subset of foodies in the 3D printing community, food printing involves the layer-by-layer assembly of treats. Hershey's and NASA have already explored 3D printing's versatility, but crowdsourced efforts such as Bocusini, a plug and play 3D food printing device will bring food printing to the masses. Many predict this process will enhance the sensorial pleasures of food and jumpstart personalized nutrition.



“Food-industry incumbents should take careful note, as the 3D printer could one day be the Uber of their industry, placing on-demand, customized food within everyone’s reach.”

Robert Plant, Associate Professor, University of Miami



FOOD PORN

18.9 MILLION

Number of subscribers to the top
10 food channels on YouTube in
2015

- *YouTube*

VISUAL UMAMI

Dining has always been a form of entertainment, but food entertainment is expanding beyond the confines of earnest cooking shows on The Food Network into more surreal territory. Repetitive, hi-def, looped and slo-mo Internet videos, Vines and GIFs create oddly satisfying content to sate the senses. The Food Surgeon is an anonymous 20-something YouTuber who has gathered quite the fan base to his channel to watch him cutting up food in mesmerizingly clinical videos that could double as offshoots of the horror genre. And packaged food is being bundled with content, such as Cup O Noodles' noodle eating companion videos in Japan, so one never has to slurp alone.

HOW TO CATER TO YOUR AUDIENCE

The audience for food is diverse and complex. There are foodies driven by pleasure and novelty who are also concerned with the environment. There are anti-GMO forces who take pleasure in the more sensuous aspects of food culture. And there is everything in between.

Our Future of Food report provides insights into the changing landscape and cultural importance of food, creating thought starters for research and ideation in the following areas →





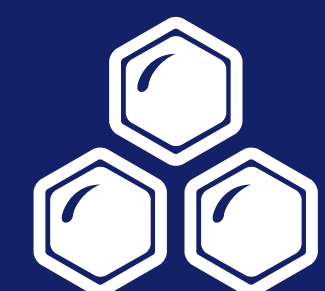
The demand for foods that are “fresh” and “real”



An awareness of your ecological footprint and “waterprint”



The importance of recycling and “waste positivity”



The provenance of an ingredient(s)



The desire for novelty mashups, new textures, formulas, colors



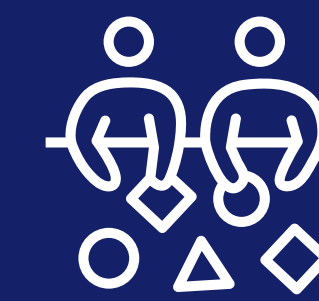
Understanding and building upon mood-states and energy



Don't just master food tech, shape it



Build for sharing: meals, recipes, innovation, and content



Co-create the future with your audiences



THE FUTURE OF FOOD: LIVE TO EAT, EAT TO LIVE
SPARKS & HONEY CULTURE FORECAST

reports.sparksandhoney.com
@sparksandhoney

Sean Mahoney
Editorial Director

Camilo La Cruz
Head of Content

Terry Young
CEO & Founder

CREATIVE & EDITORIAL

Eric Kwan Tai Lau
Senior Art Director

Barbara Herman
Senior Writer

Anna Sofia Martin
Senior Writer

Do-Kyun Kim
Design Intern

RESEARCH & CULTURAL INTELLIGENCE

Sarah Davanzo
Chief Cultural Strategy Officer

Imari Oliver
VP, Cultural Strategist

Dan Gould
Senior Cultural Strategist

Lilian Wong
Cultural Strategist

Nick Ayala
Cultural Strategist

Wesley Luna-Smith
Junior Cultural Strategist

AGENCY & CONSULTANCY

Paul Butler
Chief Operation Officer

Mike Lanzi
Chief Client Officer

Tim Ettus
Managing Director, West Coast



For this report, sparks & honey tapped in to our global scout network and proprietary cultural intelligence system, combing through thousands of signals to build a vision of the future of food.



Image sources

Anna Shepulova, Shutterstock

Shebeko, Shutterstock

Meg Wallace Photography, Shutterstock

Artpritsadee, Shutterstock

Marco Aprile, Shutterstock

Maksym Gorpenyuk, Shutterstock

Gualtiero Boffi, Shutterstock

G-stockstudio, Shutterstock

Aaltair, Shutterstock

Saya Muncil, Chocolate Chip Oreo Cookie

Subbotina Anna, Shutterstock

Doug Shutter, Shutterstock

Guntsoophack Yuktahnon, Shutterstock

Piotr Marcinski, Shutterstock

Tinxi, Shutterstock

Melodia Plus Photos

No parts of this publication may be reproduced, copied, distributed or transmitted in any form without the permission of sparks & honey.

© 2016 sparks & honey, LLC. All rights reserved.

