



5 factors that will drive consumption trends over the next 15 years.



Changing face of the consumer

- ◆ **Middle-class explosion**
- ◆ Urbanization
- ◆ Shrinking family size
- ◆ Women in the workplace
- ◆ Rich become richer

Globally middle-class spending will almost triple by 2030

Evolving geopolitical dynamics

- ◆ Rising labour and commodity costs
- ◆ Economic interconnectedness
- ◆ **Economic power shifts**
- ◆ Climate change

China's GDP could exceed US real GDP within 10 years

New patterns of personal consumption

- ◆ Focus on health and wellness
- ◆ **Sharing economy**
- ◆ Demand for customization
- ◆ Shift in discretionary spending
- ◆ Focus on shopping experience
- ◆ Increase in convenience, buying local

The size of the sharing economy could exceed 4300 billion by 2025¹

Technological advances

- ◆ **Mobile world**
- ◆ Advanced robotics, autonomous vehicles
- ◆ Social media driven consumption
- ◆ Big data for operations
- ◆ Advanced analytics for marketing
- ◆ Artificial intelligence

By 2030, 3 out of 4 people will own a connected mobile device

Structural industry shifts

- ◆ **Activist investors**
- ◆ Continued consolidation
- ◆ Direct to consumer models
- ◆ Talent shift/drought

More than 300 companies faced activist demands in 2014 alone²

Source: ¹The Sharing Economy, Pricewaterhouse Coopers, April 2015. ²Activist Insight.

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