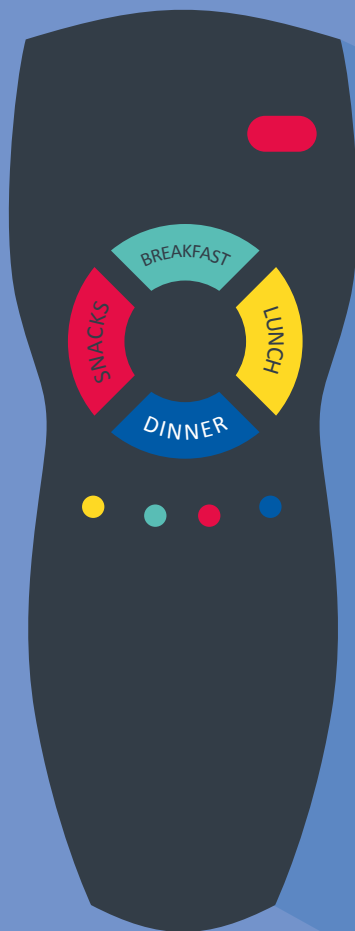


# Buying for convenience

Nine trends shaping the retail and FMCG landscape

A whitepaper from  
Sun Branding  
Solutions



Pressed for time, spoilt for choice and always wanting more; today's consumers' demand for convenience in every area of their lives presents a huge challenge for brands and retailers. These days, consumers don't want to compromise on quality, service or value just because they have an immediate need. The days of paying a premium for a loaf of bread from the only shop open at 8pm on a Sunday night are long gone.

IGD figures show that convenience shopping is set to be worth £47.1bn by 2022<sup>i</sup>, and stats from GlobalData<sup>ii</sup> predict that the convenience sector will grow 4.1 per cent in 2018 alone, outperforming the total UK grocery market by 0.9 percentage points.

It's a trend the big names are responding to; in 2017, UK retailers Tesco, Morrisons, Sainsbury's, Asda and the Co-op all announced strategic partnerships with symbol groups and Convenience stores (C-stores) that would strengthen their position in the convenience sector. Even Harrods is getting in on the action<sup>iii</sup>, creating a convenience offer that focuses on Londoners, not its usual tourist clientele. Selling everything from fresh bread to baked beans, its range is more functional, but is enhanced by a number of in-house experts in bread, coffee and tea, ready to provide a more premium service with the more everyday range.

It's an aggressive market, in terms of both offer, reach and price. At the end of 2017, the Co-op announced it was making £50m of price cuts<sup>iv</sup> to bring its basket spend in line with its convenience rivals, and it's planning 100 new store openings in 2018 following significant sales uplifts in 2017.

It's not just retailers that are jumping on the convenience band wagon; brands are rethinking their strategies to increase distribution to C-stores. At the end of 2017, organic dairy brand Yeo Valley signed a deal with fresh milk distributor Freshways and dairy Co-op Omsco to get 10 million extra litres of Yeo Valley milk delivered to independent retailers and coffee shops<sup>v</sup>.

Convenience shopping is set to be worth £47bn by 2022



71% of UK shoppers

state convenience is more important now than 5 years ago



18% of UK shoppers have ordered using same day delivery



Retailers are partnering with C-stores and Symbol Groups

Consumers want more convenience without compromising on:



Time



Choice



Quality



Service



Value



Health

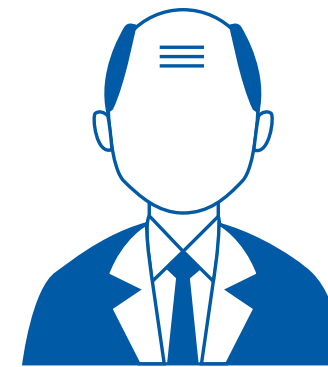
Increasingly, the big four UK retailers are looking to rationalise their estates, providing smaller stores in urban locations and shedding the warehouse-style stores they no longer believe to be viable. Supermarkets are also looking to new ways to engage the convenience-focused shopper, whether that's click and collect on your big shop or hot food to go (FTG) from your favourite restaurant chain.

**Such brand link-ups are essential to targeting Gen Z – the urban-dwellers who should be convenience stores' mainstay but who are, in fact, reducing the frequency of their visits to their local C-store.**

While almost half (45.8 per cent) of over 75s visit convenience stores at least five times a week<sup>vi</sup>, the percentage of 18 to 24-year-olds doing the same stands at just 27.4 per cent and continues to fall. So, any new developments in format, technology or product offering have to be founded on a robust understanding of each brand, and even locations, core demographic and their complex needs.

Convenience is impacting every part of our lives, from top up shops to meal planning and prep. Online players like HelloFresh and Gousto are seeing major growth amongst shoppers wanting to cook from scratch, but who don't want to venture into a major store. Deliveroo and UberEats continue to grow in terms of reach and sales, with 54 per cent of consumers under 35 saying they'd used their services in the last three months<sup>vii</sup>. This creates not only competition for more traditional players but a market where customers expect to be able to get what they want, when and however they want it.

New research suggests that UK shoppers' expectations surrounding convenience are changing with a series of emerging innovations having the potential to further reshape the retail market. According to research by retail and shopper marketing agency Savvy<sup>viii</sup>, 71 per cent of UK shoppers say that convenience is more important to them now than it was five years ago, but that they want all stores to be convenient, not just C-stores.



**46%**  
**of over 75s**  
visit stores 5 times a week



**27%**  
**of Gen Z**  
visit stores 5 times a week

Shoppers told researchers that they had 'fallen out of love' with large format stores, and actually preferred the layout of discount stores in terms of ease of shop.

Same day delivery services are negating the need to venture out for emergency supplies, with 18 per cent of UK shoppers having ordered a product online for same day delivery (rising to 27 per cent for Generation Y shoppers). Services such as Sainsbury's Chop Chop (a service which allows shoppers to order up to 25 items which will then be delivered to their home within 60 minutes for a £4.99 delivery charge) appeals to 49 per cent of shoppers.

So, in a world where technology and consumer behaviour is changing on an almost daily basis, how can brands and retailers find their niche in a convenience-driven world? The next nine chapters highlight some of the key trends, to help brands and retailers stay ahead of the curve.

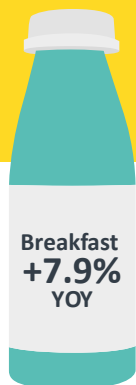
## 1. Convenient solutions on the go

FTG is seeing significant growth, particularly with younger demographics.

A staggering 95 per cent of the UK population buy FTG four times a week, spending £508 a year, per person

according to Kantar Worldpanel<sup>ix</sup>. Consumers spent £763.4m more on FTG in 2017 than they did in 2016 (a 3.2 per cent increase) with premium sandwiches, salads and sushi playing a major role in the uplift. Breakfast is also driving significant growth, up 7.9% YOY. According to Weetabix, who have tapped in to the convenience trend with drinkable products, there are 3.5 billion occasions when people either skip breakfast or eat it on the move. Weetabix sold over 18 million bottles of Weetabix On The Go in 2017, making it the 16th biggest cereal product in the country.

It's not just the UK market where FTG breakfast options are a key focus for growth. Sun Branding Solutions' strategic creative arm Parker Williams has recently been working with Egyptian snack brand Molto to give its on the



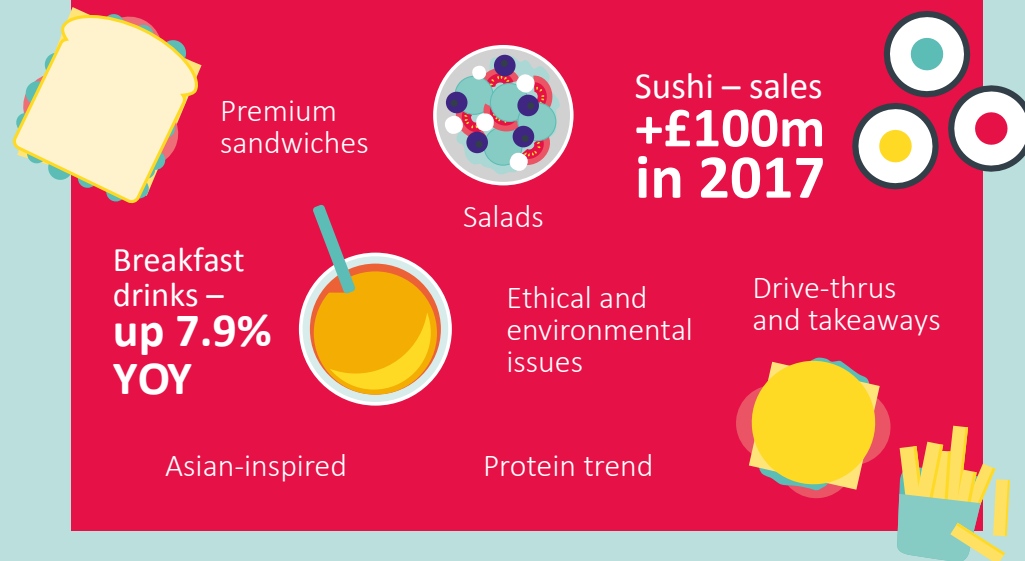
# Did you know?

**95%**  
of UK consumers  
buy FTG 4 times per week

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## What's hot in FTG?



go breakfast range of pastries and croissants a new look that appeals to a younger, urban consumer.

“Our approach was to build on Molto’s existing loyal consumer base by engaging at a more emotional level and bringing modernity, fun and taste appeal to the packaging design,” said Parker Williams creative director Jo Saker.

“The hand-crafted brand mark is dynamic and approachable with a Molto ‘smile’ to reinforce sociability. The use of a bright, fresh palette injects energy and disruption to the Egyptian snack market, whilst hero ingredients bring desire and appetite appeal.”

There’s no doubt that younger generations are driving the out of home eating experience. According to research from HIM<sup>x</sup>,

**while Gen Z are reducing their visits to C-stores, their visits to FTG outlets and coffee shops are on the rise, with breakfast options providing a major opportunity.**

As consumers demand healthier, more diverse options in FTG, new brands and independents are making major in-roads into providing quality, healthy food that fits with the way modern consumers live their lives.

Sales of supermarket sushi hit more than £100m (+£16m) in 2017<sup>xi</sup> making it the fastest growing main meal in FTG, and Asian-inspired FTG is driving major innovation on the high street. Parker Williams worked with new convenience brand Soboro – created by Wasabi chain creator Dong Hyum Kim – to create a complete identity for its new FTG offer. Serving Japanese and Korean fusion food, from speciality teas and coffee to Asian pastries, the chain taps into the trend for new cuisines and innovation, making lunchtime about more than pre-

**Sushi is  
the fastest  
growing FTG  
meal**



packaged sandwiches. The Cambridge store’s food is handmade and baked on the premises, creating a more artisan feel with the convenience of a chain format.

Jo Saker, creative director at Parker Williams said: “The brief was to work with this strong brand and create exciting elements to bring the character and story of the brand to the forefront. Our brand design takes the customer on an immersive journey from pack through to in-store communications reflecting the unique brand proposition represented by Soboro’s founder, Mr Kim.”

The team at Parker Williams kept true to the Japanese and Korean design cues while reflecting the quality and freshness of the offer. Soboro presents itself as a healthy alternative to many high street food destinations as the food is fresh, handmade and baked on the premises. The packaging remains clean and simple with subtle eastern influences. Open from breakfast through to early evening it includes a range of Korean and Japanese pastries and sandwiches like rolled matcha croissants and chicken katsu sandwiches.

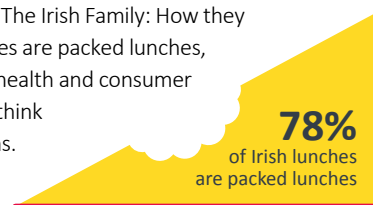
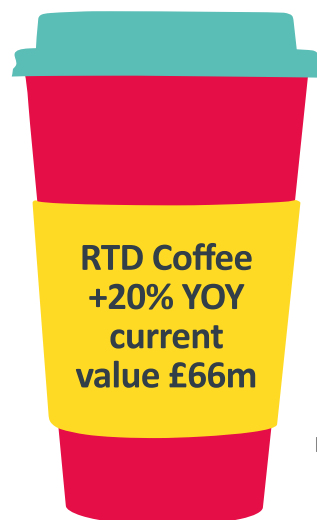
Long-established British FTG brands are also changing their focus to cater to the modern consumers’ needs. Greggs – the High Street baker best known for its sandwiches and pasties – have been playing around with both product and format in the last year. It launched a ‘Balanced Choice’ range

for the more health-conscious customer, launched its first drive-through, and also announced plans to open in the evening to provide take-away hot food like roast chicken, pasta and pies. Partnering with UberEats would make this evening venture even more commercially viable.

Sainsbury's has already trialled an in-store FTG concession in its Balham store, partnering with High Street chain Zizzi's to target Gen Z's love of restaurant quality food outside of the usual dining experience.

Even markets that have been slower to respond to convenience trends are demanding more. According to Kantar report The Irish Family: How they shop<sup>xii</sup>, even though 78 per cent of Irish lunches are packed lunches, an increasing focus on health – from a public health and consumer point of view – is encouraging Irish brands to think differently about out of home eating occasions.

Coffee shops and cafes are one of the biggest growth sectors in out-of-home eating in Ireland<sup>xiii</sup>. It's no surprise that healthier foods are trending, but the Irish consumer is also greatly influenced by local, fresh and provenance messaging. Irish consumers remain fiercely loyal and supportive of local businesses and Irish brands, which has seen the success of urban FTG innovators such as Sprout and Chopped experience continued growth, with Chopped selling over 20,000 healthy salads a week<sup>xiv</sup>, despite the challenge and expansion of international brands such as Starbucks. An Irish FTG shopper has the benefit of experiencing stores such as Fresh, which offer gourmet sandwich bars, freshly prepared hot food and Asian street food in a food hall style environment. It is evident that the raft of premium, urban FTG options available in Ireland, shows a great understanding of the Irish consumer.



Big FMCG brands are tailoring their offers to cater to the need for more convenient solutions on the go. Coca Cola recently announced the launch of its new Honest Organic Coffee – ready to drink cold coffee that's less sweet than other products and, as a result, is exempt from the looming sugar tax. The product range will tap into the growing consumer demand for RTD coffee products<sup>xv</sup>.

The protein trend is driving NPD in convenience too, with Arla recently adding flavoured water with protein to its on-the-go protein range, which already includes squeezable yoghurt pouches, low sugar milk drinks and yoghurts with seed toppers. Ryvita recently introduced two new added protein SKUs baked with pea protein which, coupled with its recent decision to sell only portion-controlled snack packs, taps in to both the protein and convenience trend.

For those with more adventurous tastes, new protein sources like insects are set to become more mainstream as concerns over the sustainability of livestock farming grows. British brand Eat Grub recently launched a range of mail-order insect-based snack products, including roasted crickets, insect-based snack bars and protein powders, for those wanting to swap their desk drawer snacks for something a little more exotic.

And the thirst for new ingredients that meet a functional need has sparked a number of challenger brand launches, including Love Hemp water, a brand created by Parker Williams.





It's the first bottled spring water containing natural CBD hemp extract – believed to ease anxiety and other health concerns – to be launched in Europe. Love Hemp Water joins a growing market for functional waters with the stress on health consciousness as an increasingly important purchasing factor.

Becky Fone, brand and innovation director at Parker Williams said “Our task was to bring credibility to an ingredient that has a certain stereotype attached to it. Hemp, once the darling crop of the USA, swiftly fell from grace and was linked with psychedelic effects enjoyed in the ‘60s. Fast forward 50 years and its health benefits are now once more being heralded”.

But it's not just NPD that's creating differentiation in the FTG market. Major chains like Costa, Starbucks and Pret a Manger are using ethical and environmental issues to drive brand advocacy. Pret, in particular, have continued to increase the discount customers get for using reusable coffee cups, were one of the first to ban plastic straws, and give unused food away to homelessness shelters. Increasing the plant content of sandwiches and increasing its veggie sandwich options is just another way Pret are differentiating in a crowded market where product offer isn't the only consideration for the consumer.

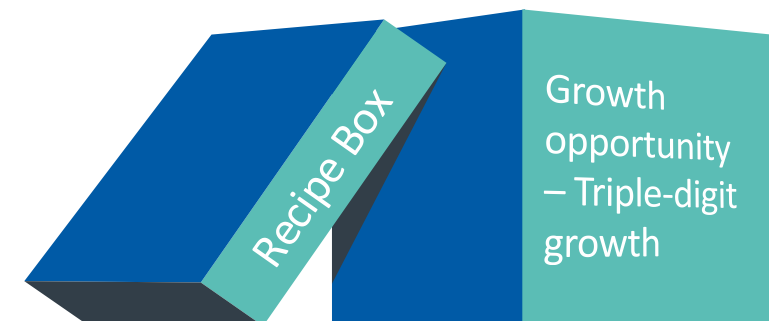


## 2. A return to home cooking and family mealtimes

In recent years, convenience in home cooking meant ready meals in plastic trays. But increasing awareness of healthy, balanced eating has driven significant change in product and format, making it easier for individuals and families to cook, whatever pressures they have on their time and budget. Families may not be able to sit down at the dining table every night but doing it when they can is becoming a real priority.

A need for convenience and ease of use has also fuelled a move towards delivered meal solutions, with the likes of HelloFresh and Gousto capitalising on the increased spending power of time-poor but cash-rich consumers, delivering just the right amount of everything to their customers' door.

Gousto recently added to its offer<sup>xvi</sup>, launching a premium dine-in recipe box option to cater to those looking for restaurant quality at home. The boxes include British meat, responsibly sourced fish and more unusual veg and carbs. This adds to its standard offer, as well as the healthier Boost & Balanced range, featuring plant-based dishes.



Gousto currently deliver half a million meals each month, and although at just one per cent of UK grocery spend the recipe box market is still relatively small, it's a concept some supermarkets are already eyeing up, with Waitrose and the Co-op both trialling their own in-store boxes. And although sales are



so far relatively small, many recipe box companies are seeing triple-digit sales increases, so if suppliers can get the right mix of price, service and innovation, it's an area that could be worth some investment.

The desire for 'as good as home cooking' continues to drive innovation across all categories even baby food. Natural, wholesome ingredients with no added nasties, interesting recipes and flavour combinations are now the norm and challenger brands are pushing the boundaries of the category to appeal to parents who want the freshest, most natural, but still convenient options for their baby.

"It's not just about ingredients," says Parker Williams co-founder Tamara Williams.

"Brands now offer benefits relating to the process they use. Once Upon a Farm and Pure Spoon in the US, Savse and Little Spoon in the UK and Switzerland's Yamo for example, all preserve the nutritional value, vibrant flavours and colours of chilled food through cold pressure rather than heat.

"Of course, a short shelf life also demands a rethink of how the products are shopped. Chillers in the baby aisle? Dedicated space in the dairy chiller? Home delivery? It's changing the way we shop and changing shoppers' expectations."

Frozen food is also seeing a resurgence, with its image being given a major makeover by both brands and retailers. Iceland's range revamp, which most recently incorporated kids' meals and Indian street food-inspired dishes, is bringing a new foodie focus to a brand once viewed as a budget freezer filler.

Not only is Iceland focusing on range, it's looking to be more sustainable from a packaging point of view, introducing paper-only packaging for its NPD<sup>xvii</sup>. The retailer is shifting its brand proposition to quality and value across the board, investing £2.5m in a new development kitchen<sup>xviii</sup>

and swapping its celebrity affiliations from Kerry Katona to Heston Blumenthal to appeal to a whole new customer base.



Richard Walker, MD of Iceland Food Warehouse

Iceland has also increased the number of healthy Slimming World frozen meals it stocks, with more than 25 favourite dishes in the range. Slimming World promotes scratch-cooking where possible<sup>xix</sup>, but created its frozen range to fit around the realities of a modern family lifestyle. And it's this flexible approach to home cooking, across fresh, frozen and ambient, that has become a key opportunity for a whole host of brands and retailers.



Quality is improving across the board in prepared meals, as consumers expect the same taste and quality ingredients they'd use if they had the time to cook for themselves.

Frozen food company Cook takes an omnichannel approach, which incorporates around 80 small, modern stores and online ordering for home delivery or click and collect, providing favourite family meals made with quality ingredients. With dishes including shepherd's pie, chicken, ham and leek pie and hearty casseroles, a meal for four costs between £12 and £22.50. It might not be the cheapest way to feed the family, but the combination of convenience, quality and firm family favourites has meant the concept has seen real success since launch. Shoppers can navigate by number of servings, diet type or protein, making it easy to find meals that fit your life.

This jump in quality and taste experience is steadily trickling down to mainstream frozen ranges, giving consumers looking for convenience and value the chance to eat more varied meals made using quality ingredients. Young's have taken the staple breaded frozen fish and created a range of products with different flavours and textures for Young's Gastro, to create 'restaurant quality' meals straight from the freezer.

Inspiration is also key to engaging customers on the benefits of your brand. Quorn, which has already repositioned itself as a 'healthy source of protein' rather than meat free, to broaden its appeal, provides ideas on 'weeknight winners' on its website<sup>xx</sup>, helping families eat healthier while understanding the pressures on time, budget and diet that can sometimes make home-cooking a chore.

That's not to say that the good old ready meal is falling out of favour. Since

## Growth opportunity - Frozen Food

Marks and Spencer launched its meal deal offer nearly 10 years ago, easy, great value dine in options have spread throughout the big food retailers. Offering an alternative to eating out or ordering in, competitively priced deals like M&S' Dine in for £10 not only tap in to consumers' need to eat varied cuisines with quality ingredients, but act as a major driver of footfall and increased basket spend – particularly around major calendar occasions like Valentine's Day and Easter.



# What's happening?



**Over 79%**  
**of Gen Z's**  
snack at least once a day



**62% of**  
**over 55's**  
snack at least once a day



Retailers are set to reduce  
calorie content by  
**20% by 2024**



Overweight children  
consume up to  
**500 calories**  
a day more than they need

## Snacking trends

Plant-based snacks

Chickpea-based snacks

Vegan jerky

Biltong

## Eating habits

Eating 'little and often'

Reducing sugar intake

Compromise between convenience  
and health

Four meals per day

## 3. Healthier, more frequent eating

Gone are the days when a quick snack meant a jumbo grab bag of crisps or oversized chocolate bar from the corner shop; these days, consumers are demanding more from snacking occasions, whether it's on the go or at home.

**Plant-based snacks derived from nuts, seeds and seaweed are already hitting the mainstream, and chickpea-based snacks saw 150 per cent growth last year<sup>xxi</sup>.** The US and Asia are seeing launches including vegan jerky – trends that soon spread to the European market, particularly as our willingness to experiment with new flavours and ingredients increases. Biltong, jerky and popcorn have seen major NPD and sales success, as protein and reducing sugar intake continue to be a priority.

Brands like The Food Doctor are seeing mainstream growth, as healthier snacking options move out of the health food aisle and into category, extending the breadth of ingredients and product formats available. Snacking presents a major opportunity for both brands and retailers, as more consumers go for 'little and often' over the traditional 'three square meals a day'. According to the Waitrose Food and Drink Report 2017<sup>xxii</sup>, squeezing a fourth meal into our day is becoming more and more acceptable. Mintel research<sup>xxiii</sup> shows that Gen Z in particular are a generation of erratic eaters and snackers, with

**nearly four in five (79 per cent) consumers aged 16-24 snacking once a day or more, compared to 62 per cent of snackers over the age of 55.**

With this growing penchant for between meals eating, snacking has become a major focus of public health initiatives. The Government's Change4Life<sup>xxiv</sup> recently launched a campaign focusing on kids' snacking habits, warning parents of the amount of sugar children are taking in from snacks. The 'Look for 100 calorie snacks, two-a-day max' message aims to broaden the scope of family snacking to include more fruit, veg and less sugar, adding



Designs from Change 4 Life's 100 Calorie Snacks campaign



variety and taste. Research from Public Health England<sup>xv</sup> found that overweight children are consuming up to 500 calories a day more than they need, which has driven a push to encourage retailers and manufacturers to reduce calorie content in a range of products by 20 per cent by 2024.



Overweight children are consuming  
**500**  
calories/day  
more than they need

However, Sun Branding Solutions head of regulatory and legal Phil Dalton says there's a disconnect between public health campaigns and labelling criteria, which makes it difficult for parents to make an informed decision about the snacks they give their children.

"Current labelling of food is at odds with this message and needs to change if information about salt, sugar and calories is to be used effectively by consumers when they are making a purchase in the aisles," he says.

"The campaign wants parents to make healthier choices for their children's snacks without telling them exactly what to look for on labels. If parents do look for products labelled as 'healthy' these probably won't be the products that help them tackle childhood obesity."

"There is currently no link at all between labelling a product as 'healthy' and the amount of fat, sugar or calories it contains. Also, calories per serving is not required, the legal minimum is to provide this as kcal or kJ per 100g. Research shows that consumers don't understand current labelling, in particular the inclusion of kJ causes confusion, and now we have this new message which highlights the importance of calories per serving. In many cases the consumer will need to do a calculation based on the 100g values and serving size to see if it meets the 100 calorie criteria."





Whitworths' Bright Little Nuts range

However, this campaign offers a real opportunity – and incentive – for brands and retailers to offer innovation and inspiration to help families snack more healthily, developing products and ranges that tap in to this functional need.

Fruit and nut brand Whitworths are already moving in to this space with the launch of its Bright Little Nuts range – multipacks of natural snacking nuts – focused on the nutritional benefits. This goes to show that there's not always NPD needed; just a repositioning of a natural product in a child-friendly portion size and pack format that can fit in a pocket or handbag.

Health and 'betterment' is a major focus across the board, with more and more consumers demanding convenience that doesn't compromise their desire to eat healthily. However, as more of us become amateur health experts, it's vital to strike the right balance between healthier options and great taste, making incremental improvements without spoiling our enjoyment of food. It's a tough balance between innovation, value, quality and authenticity, and one brands need to get right if they want to build lasting advocacy rather than driving a one-off purchase.

## 4. Technology as a driver and an enabler

One of the greatest drivers of convenience in recent years has been technology, opening up new markets and giving brands and retailers direct access to their core customers at the most relevant moments in their lives. Whether we're out at work, spending time with the family or relaxing at home, technological developments give us more access to the things we want and need right now than ever before, so it's vital that brands keep up.



From the Amazon Dash button that sits on your washing machine and reorders a specific brand of laundry detergent with one click, to the development of smart fridges that can order ingredients to make a meal with what's left inside (Australian retailer Woolworths is working with Samsung to develop this), there's a real focus on using artificial intelligence to make our everyday lives easier.

But it isn't technological advancement that's driving change; according to a report from EY<sup>avi</sup>, the biggest disruptor is actually consumer behaviour.



Understanding customer need is key to leveraging tech innovation; for example,

**Tesco has teamed up with Spoon Guru to create an app that helps customers with specific diets or tastes to quickly find food to suit them.**

Integrating Spoon Guru's database with Tesco's online grocery platform means consumers can search for products that fit with a number of dietary needs, including lactose free, gluten free, vegetarian and vegan, with lacto-vegetarian, low sugar, organic, ovo-vegetarian, paleo, pescatarian, Kosher and Halal soon to follow<sup>xxvii</sup>.

And it's not just the big retailers who are tapping into a consumer need to find what they need fast. Yorkshire-based Paleo & Co recently launched a marketplace for people following a paleo diet (where you can eat anything we could hunt or gather way back in the day – things like meat, fish, nuts, leafy greens, regional veggies, and seeds), using simple aggregation technology to create a space where small producers could sell their product through one online shop.

"We moved back to the UK from the US having discovered the Paleo diet but struggled to find the foods we were used to," says Paleo & Co co-founder Jonathan Simpson, former senior customer marketing director for Heineken USA.

"We were shopping in different shops for different things and it was a nightmare. We wanted to find somewhere we could buy everything we need to eat paleo, and it didn't exist here. So, we created Paleo & Co, sourcing the products for a niche but growing lifestyle and making them available to a wider audience, whilst helping small suppliers (who may not even have been aware that their products are Paleo) find new customers.

"By using aggregation theory and a drop ship model, the site does this in a way that could never be done in traditional retail channels".

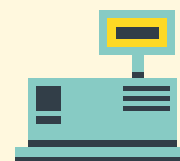
# Consumer behaviour is driving change



**20%**  
decline in cash payments<sup>xxvii</sup>



**60%**  
of online shoppers have given up on online purchases as they're too much hassle



**Still demand**  
for traditional checkouts and self-scan



**63%**  
of UK shoppers would use Amazon Instant Pick-Up (available in the US)

## Next generation



Of course, technological advances aren't confined to online interactions – the in-store experience is changing too.

Following in the footsteps of Amazon Go, the Co-op is trialling pay in aisle technology in one of its Manchester stores after the retailer saw a 20 per cent decline in cash payments over the last five years<sup>xxviii</sup>.

Customers can select products and scan them on their smartphone, using pre-set payment details to complete the checkout process. However, unlike Amazon Go, the Co-op has chosen to retain traditional checkouts and self-scan, to cater to all customer needs and adoption rates. This blended approach is key as although every demographic is embracing new technology, it definitely isn't a case of one size fits all. Just because consumers want convenience, that doesn't mean they don't want choice too.

Both the Amazon Go and Co-op trials are invariably an opportunity to gain valuable data and insights into what matters most for their customers, using machine learning to create more tailored propositions for individual customers. Not only does this make the shopping process easier, it creates a sense of personalisation that's becoming increasingly important to the modern consumer. Tied in to loyalty schemes, retailers are able to anticipate consumer need and create tailored offers based on their previous behaviours – for example, if a coffee shop knows Bob buys a latte at 10am every Tuesday, they can send him a tailored offer for 50 per cent off pastries via text message at 9.45am.

In the case of the Co-op trial, the payment app is linked to the customers' loyalty account, and can instantly show them how much they've saved, and how many points they've earned. The retailer has also tied in an own-brand incentive, with shoppers receiving a five per cent reward when they buy own-brand products, with the retailer donating a further one per cent to charitable causes.



Photograph: Chris Bull/Co-op

**The next generation of pay in aisle technology looks set to hit UK supermarkets towards the end of 2018, in the form of intelligent shopping trolleys, or store GPS<sup>xxix</sup>.** Customers use a touch screen to load shopping lists, and the system helps them find the items in store. Customers can then check off and pay for items as they go, without having to go through the checkout.

Amazon continues to leverage its tech to grow its channel mix with – on top of traditional online shopping, Amazon Pantry, Amazon Dash and Amazon Go – it's trialling Amazon Instant Pick-up in the US. The service allows shoppers to order items on a smartphone app, then pick them up from a nearby location within minutes. It's a speeded-up version of click and collect – a concept that's become embedded in UK supermarket and mail order culture – and 63 per cent of UK shoppers<sup>xxx</sup> say they'd use it if and when it's available here.

Speed is definitely a recurring theme when it comes to inspiring the tech that creates more convenient shopping. According to a KamCity report, 60 per cent of shoppers have given up on an online purchase because it was too much hassle to click through a website or app. Convenience means great user experience and intuitive navigation, so it's vital to consider this when developing a service driven by convenience.



## The growth of voice search is also likely to have an impact on customer journeys where convenient shopping is concerned.

Although functionality is currently fairly limited, it's a major focus for developers and brands, with the future potential to be able to order groceries, book a restaurant or even arrange a mortgage simply by using your voice.

Established channels are evolving, with the click and collect grocery services that the majority of major retailers provide morphing into something even more convenient. An experiment by Volvo saw Swedish shoppers taking the click and collect concept to a new level with GPS tracked grocery deliveries to your car. The trial service removed the need to select delivery slots, which reluctant online shoppers may cite as a barrier.

You order your groceries online, and your order is packaged for delivery, but instead of being delivered to your home in a designated time slot, the delivery driver tracks the GPS co-ordinates of your car and follows them to wherever you've parked. They then use a digital key to open your boot and place your shopping inside.

Walmart are taking the concept even further. Last year, the retailer trialled deliveries direct to customer's fridges in California's Silicon Valley<sup>xxxxi</sup>. The delivery person arrives at your home and if no-one's in, enters a one-time passcode into the front door's smart lock. They then unload your purchases straight in to your cupboards and fridge. When the passcode is activated, a notification



is sent to your smartphone, so you can watch the delivery person inside your house via a live-stream from home security cameras.

It's rumoured that Amazon are hot on Walmart's heels – particularly following its recent partnership with Morrisons – but so far, no-one in the UK has committed to a straight-to-fridge delivery service.

But it's not just in-store where technology is driving innovation. When you get your purchase home, or to your desk, there's a real opportunity for brands to create a second moment of truth by incorporating Animated Intelligence (AI) into their pack design. The next generation on from QR codes and augmented reality pack design, this technology embedded in pack design can create greater brand engagement and encourage continued use of packaging by providing scannable content – particularly relevant for higher engagement categories like beers, wines and spirits and health and wellbeing.

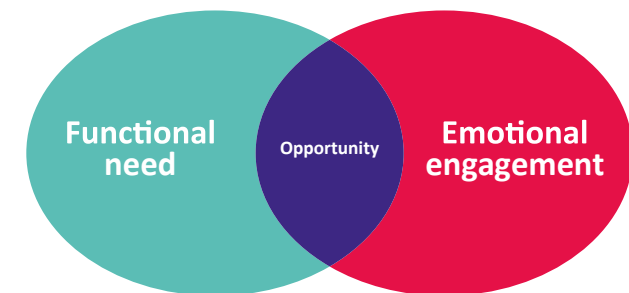




## 5. Getting the right balance – function plus emotion

As our world becomes increasingly automated and robots and AI enable so much of the retail experience, it's vital for brands and retailers to balance innovation and progress with great service and human interaction. For example, Amazon Go stores are expected to function with just three members of staff and lots of robots.

Some services are low-emotion – for example, ordering day to day essentials that serve a functional purpose – so we're less concerned about not dealing with a real person (unless that service doesn't deliver). But in other areas, where we're looking for an experience and a story to tell, it's vital to maintain the highest levels of service, knowledge and interaction with customers. For example, in Harrods' new convenience store for Londoners, offering in-house product and category experts to give one-on-one product advice to customers is essential when they are paying a premium to shop there.



Testing what works on a small scale before you take the plunge is something many brands do as standard these days, using pop-ups to refine their offer before going national. Upmarket fast food chain Leon are doing just that with their new Thai-inspired FTG offer Tuk Shop, a new concept offering Thai cuisine delivered through Leon's fast food kitchen model<sup>xxxii</sup>. Tuk Shop will launch as a pop-up in one of Leon's existing West End sites with a menu focused on Thai curries, noodles, rice dishes and salads, delivered through a tried and tested customer service model.

Marks and Spencer is doing the same – applying its long-established service and quality standards to a new concept, a new sushi counter in its Westfield store in Stratford<sup>xxxiii</sup>, followed by four more throughout the year. A partnership with established sushi chain Wasabi, the trial is a response to Sainsbury's and Waitrose launching sushi counters in store but combines Wasabi's established range with M&S service standards for a concept that can hit the ground running.

This blended retail and food service experience is commonplace in the Far East, with in-store meal prep already established.

**In China, Alibaba's Hema Fresh stores are a hybrid of online and offline retail and foodservice. Shoppers can have fresh foods cooked for them in-store, or have products picked from the store and delivered within half an hour if they live within a five-mile radius.**

The retailer has all bases covered, from bulk buying without the need for human interaction to chatting with a food expert, and it's this blended approach we're likely to see more of in the UK as consumers demand more from every purchase and interaction.

A key part of creating functional services with an emotional connection is set to be understanding consumer need by location, according to the IGD<sup>xxxiv</sup>. This 'hyperlocal' approach doesn't mean simply stocking your C-stores with what loyalty data tells you the local community buy most, but providing local, in-season products that matter most in that location.

The report states: "To achieve a hyperlocal offering, retailers will need to support small and medium-sized producers. This will be positively perceived by shoppers, as it helps them sustain their community and allows them to feel special, to be part of something unique."

It's an approach the Lincolnshire Co-op has been using for the last 10 years,

sourcing locally made products from within Lincolnshire to sell across its 82 stores. At first, all local products were merchandised together, but as of last year, all have moved into category, as both demand and sales grow.

"From beer to crisps, cheese to chutney, there are over 40 suppliers who together supply over 180 lines in our growing Love Local range," says Lincolnshire Co-op's chief retail officer Mark Finn.

"Each item is marked out with Love Local point of sale, which tells the story behind that producer, helping shoppers make an emotional connection to what they're buying, and promote the local option on shelf.

"Growth has been outstanding – at the end of the last financial year, sales of the range had risen by 22 per cent.

"A successful local economy is good for everyone. We know that our Love Local range gives producers a route into a wider market and keeps what's made here, here.

"All our members benefit from double dividend on local products too – they get two per cent of what they spend back onto their dividend cards. We want our customers to feel connected with us as their local business, owned by them.

"In a highly competitive retail and convenience market, our approach of keeping it local seems to be rewarded too. Our sales in food stores went up by 6.8 per cent in our last financial year."

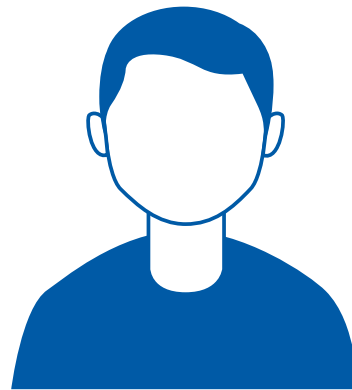
Local focus works brilliantly for food stores, but for larger multiples and high street retailers where credibility as a local champion is harder to build, in-store innovation and theatre can make all the difference. It's vital to ensure that your bricks and mortar stores are more than just showrooms or product warehouses – these days, shoppers of every demographic want a bit of theatre in their retail experiences.



A recent study showed that 78 per cent of millennials would rather spend money on experiences rather than tangible goods<sup>xxxv</sup>, so if you want to sell your goods, you need to sell an experience too. That can be as elaborate as in-store theatre, or as simple as providing seating and easy parking, to show an understanding of what matters most to your customers.

Japanese clothing retailer Uniqlo tapped in to this mix of function, emotion and personalisation with a clothing concierge service called UMood in its Sydney store<sup>xxxvi</sup>. Customers put on a headset that uses a single sensor on the forehead to measure brain activity, as people watch seconds-long video clips that each represent up to 10 moods. The technology's algorithm then measures five things — interest, like, concentration, stress and drowsiness — to measure the user's response to the videos, then match a design with the user's mood.

The service — dubbed 'Tinder for T-shirts' — shows how tech innovation and in-store theatre can be used to create a helpful service that creates curated choice and drives a lasting emotional connection for the brand.



**78%**  
of millennials  
prefer to spend on experiences  
rather than goods<sup>xxxv</sup>

## 6. Innovation inside and out

When it comes to eating on the go, pack format is just as important as the new product concept it contains. Creating a brand around great-tasting lunches you can heat up and eat at your desk will fall flat if the packaging it comes in doesn't enhance the experience or deliver in terms of function.

Sun Branding is currently working with a Yorkshire-based start-up to build their brand and develop packaging that takes their hot eat product out of the artisan food market and on to supermarket shelves. The team are currently working on pack formats that the product can be heated in, but that also contain the product while you eat it.

"A major focus for this particular project is to solve the problem of eating a hot product when you're on the go, but it also needs to be something that can be heated up in the office microwave with no mess and no fuss," said Parker Williams strategy director Guy Douglass.

"This brand has an incredible product but packaging it has been a major challenge outside of artisan food markets, and this can be a real barrier for other FTG producers wanting to give their customers the same quality experience when they break in to retail environments. So, innovation in terms of pack format is key."





Even simple products can be transformed by innovative pack science. Traditional products like Soreen have innovated by focusing on occasion, not product, offering buttered malt loaf slices in single portion packs, providing an alternative sweet snack on the go.

**It's essential that brands don't innovate in pack format just for the sake of it. Consumers are savvy.**

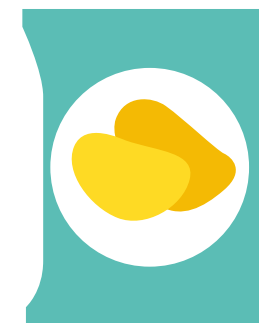
For example, packaging peeled orange segments in a tube with a peel off lid for convenient snacking may keep kids' hands cleaner, but the impact such innovation has on sustainability cancels out any perceived consumer benefit.

Understanding consumer motivation at various points in the day is key to driving relevant packaging innovation. Established brands like Baxters and John West have focused on out of home eating – specifically at work lunches – to create new products in pack formats that work for their customers. Baxters recently launched a range of microwavable meal pots in lidded bowls (no need to hunt for crockery in the office kitchen) in a range of on-trend flavour and ingredient combinations. If you haven't had time to make your sandwiches in the morning, John West has created spreadable tuna with a range of accompaniments in fridge pack pots, so you can assemble a sandwich with just a knife. Need to butter your bread first? Korean designer Yeongkeun Jeong was short-listed for a Lexus Design Award for his disposable packaging design, which provides a single serving of butter with a pull-back seal that also functions as a knife.



Even staying hydrated got a make-over with the launch of Robinsons Squash'd in 2014 – super concentrate squash that fits in your handbag or sits on your desk – and which spawned a flood of copycat products across own brand and challenger brands. It's a relatively simple reformulation, packaged in a format the consumer hasn't seen before, and novelty value goes a long way to driving sales, at least initially.

Snacking is also a category that's ripe for pack innovation, with crisps and popcorn brands tapping in to sharing occasions, though on the go eating still poses a problem. Ease of use is key when it comes to on the go eating. More health-focused options such as protein power balls make eating and walking easy, with minimal mess and waste. For those focused on cleaner eating and increasing protein intake, products like Snackamole's avocado and chickpea dip with popped chip snack pack offers convenience and variety, whether you're at home or at your desk.



**Opportunity  
for innovation  
in FTG snacking**

Personalised snack pack supplier Graze initially led the way in terms of healthier snacking and convenience, with through the mail multipack snack boxes tailored to your nutritional needs and tastes. Now available in store, Graze pack formats have been copied by a number of brands, providing clear product visibility and communication of ingredients and benefits, and the company has launched in the US, using its signature craft packaging to engage the US consumer's growing interest in eating more healthily.

But it's not just in primary packaging where brands need to innovate for convenience. Creating secondary packaging that's appropriate for smaller format stores, rather than providing one standard SRP (Shelf Ready Packaging) across all store formats, can mean better merchandising and brand consistency in store.

Sun Branding Solutions worked with Unilever to find an innovative solution to its merchandising issues with Dove. Some stores were merchandising eight products wide while some only had two, which meant store staff were decanting product to shelf rather than slotting in shelf-ready packaging, which not only took time but resulted in messy fixtures and poor product visibility. Sun Branding developed a modular wrapping in film, rather than cardboard,

so store staff could divide standard sized packs into sections that would fit their fixture, rather than having to place bottles on shelf one by one.



Considering what your packaging – primary and secondary – needs to deliver, whether it's in store, in transit or in the customer's hand, is essential to driving innovation that's relevant and engaging on multiple levels. The growth in online shopping will need to drive

a 'last mile first' approach that considers the logistics of e-commerce when considering primary packaging format, but also driving new developments in secondary packaging such as complex internal protective structures, weight reduction drives and added security.

## 7. Design for the convenience-focused consumer

Balancing form and function with strong brand and clear product messaging can be tough when your product is designed to be consumed on the go or to act as a functional solution in a busy family environment.

It's essential that products or brands built around convenience are clear on shoppers' need state when building on-pack design and selecting pack format, especially in an increasingly competitive market.

Parker Williams strategy director Guy Douglass says that shopper behaviour usually falls into one of two categories, magpie and blinkered, and that when shopping for convenience, we're usually in magpie mode.

"Shoppers in magpie mode are on the look out for something to take their fancy; they'll scan the fixture, browse and consider their options," he says.

"When we're in blinkered mode, we're usually looking for a product we already know we want or need, so are scanning for brand, shape and colour. Convenience products usually fall into magpie as they're looking for inspiration and are prepared to appraise what's on offer. So, it's essential to create impact through design, pack format and substrate to give your product real shelf standout.

**"Convenience used to mean an acceptance of higher prices and often sub-standard quality, but that certainly isn't the case today. Consumers expect quality and great taste, and this needs to be clearly communicated by design and pack format."**

Brands that create real disruption in their category are those which understand consumer need and combine this with great design and



innovative structural design. Although it might be the easier, and often cheaper, option to use the same substrates and pack formats as your competitors to compete on price, using design, pack format and materials to justify a higher price point can pay dividends.



Photograph: Charlie Bigham's

"Charlie Bigham's is a great example of a brand disrupting in its category – it turned our idea of what a ready meal should be on its head," says Guy.

"It uses the four tools in a designer's arsenal – colour, typography, imagery and form – to great effect. The fold over card allows clear

communication of product benefits, and pack formats like ceramic dishes for pies and wooden boxes for lasagnes, communicate quality as well as creating great standout in a fixture usually dominated by black CPET trays.

"The brand was originally designed to encourage couples to sit down and eat dinner together, and this featured in the on-pack illustrations. However, they've been quick to realise that the number of single-person households is on the increase, adapting their range accordingly."

## Making a difference



Reusable coffee cups



Deposit Return Scheme



Second-life packaging



Improved recycling facilities



## 8. Convenience beyond consumption

Reuse and recycling has become a regular feature of our daily life, yet many consumers are frustrated by how difficult it can be to recycle when you're out and about. Coffee chains like Costa and Starbucks have already stepped up to the plate on recycling single use coffee cups, regardless of brand, and offering incentives to customers who use their own mugs in their stores.

But there's still room for brands to innovate. At a time when the war on plastic is intensifying and consumers are becoming increasingly disillusioned with single-use packaging, it's also important for brands to consider how they can bring new life to their packs.

**"Consumers are the catalyst driving change on plastic use, now along with the government pledge to reduce plastic waste, this will result in big changes to consumer behaviour and the retail environment,"**

says Sun Branding Solutions' packaging technology director Gillian Garside-Wight.

“Brands and retailers need to move faster to respond to their customers’ demands. The announcement by Environment Secretary Michael Gove in March of a Deposit Return Scheme for single use glass, plastic bottles and steel and aluminium cans is a step towards a change in consumer behaviour and a response from suppliers.”

Second-life solutions can be functional or aspirational, or a combination of the two. Coca-Cola led the way back in 2014 by creating functional tools from its plastic bottle tops<sup>xxxvii</sup>. The fittings – which ranged from water guns to whistles, paint brushes to pencil sharpeners, gave packaging life after use that was not only functional but fun.



Photograph: Poppy Loves

Coffee brand Douwe Egberts dubbed its packaging as 'no ordinary jar'<sup>xxxviii</sup> in a 2015 collaboration with award-winning designer Orla Kiely, showing how their jars could be repurposed as functional containers, whether it be a flower vase or a pen pot.

It just goes to show that these days, packaging must do more than just preserve and protect; it needs to create a lasting sense of what your brand stands for too.

Sometimes, however, packaging reaches the end of its useful life and it needs to be disposed of – preferably for recycling. As consumers, we’re increasingly clued up on recycling and for many products, expect

recyclable packaging as standard. But there are still many products and brands that don’t comply, with crisps and snacks posing a major issue, and Sun Branding Solutions’ packaging technology director Gillian Garside-Wight says just one leading brand making a switch could start a much bigger movement.

“We can all do our bit to look at what we do through a sustainable lens. As packaging specialists, we do this for our clients already through considered design and an innovative approach to deliver more responsible packaging solutions.

“There are definitely shortfalls in packaging specification today, but these can only be resolved by the industry talking to each other and understanding the impact on the holistic supply chain,” she said.

“Last year, Pringles were highlighted as the worst packaging offender in terms of recyclability, but so are most packets of crisps as flexibles (bags) aren’t widely recoverable either. There are also increasingly high volumes of composite tubes like the ones Pringles use, for example, in premium instant coffee where alternative recyclable packaging solutions could be used.

“The key to packaging choice today is to ensure the product is protected and preserved as food waste

represents the highest carbon and financial loss – e.g. 1T of CO2e per 1T of food waste. There will always be the need for ‘difficult’ materials and it’s industry’s and government’s challenge to reduce the use of those materials and design and implement the consistent infrastructure to deal with the challenge of those ‘difficult’ materials that remain out of necessity.”

Provision of disposal facilities is also vital to ensuring on-the-go waste is processed appropriately. According to RECOUP, a charity working to reduce plastic waste.\*



**Just 42% of local authorities have bins in public spaces\***

**High footfall areas like train stations and airports have seen the complete removal of waste disposal amid security concerns, making it even harder for consumers to dispose of their waste responsibly.**

Technology would help to alleviate security concerns in places like airports, with bins that scan packaging and only let you dispose of something bought within the confines of a secure zone.

# The only constant is change

As technology advances and consumers continue to demand more from the brands they engage with, the retail landscape looks set to continue to be challenging. Convenience isn't just about an immediate need anymore – it's about offering interaction, innovation and inspiration at key pressure points in the consumers' day.

## Street food growth

According to Waitrose's 2018 trends report<sup>xxxix</sup>, street food will continue to be big, with delicate Indian dishes seeing growth. We'll also see the rise of Japanese 'dude food' – a more indulgent, eat with your hands take on traditional Japanese cuisine, featuring dishes like yakitori skewered chicken and deep-fried tofu in broth.

## Four meals a day

We're still going to be fitting a fourth meal in to our day in 2018, and our choices look set to be healthy ones. Plus, we'll be looking to supermarkets to provide more than just our 'big shop', with pop up restaurants, wine bars and retail-tainment becoming increasingly important additions to big names' offers.

## Easy meal solutions

The growth of meal kits providers, street food hubs and restaurant-quality meal delivery shows that quality and inspiration is a key driver in developing products and services that cater to ever-more-demanding customer needs.

## Brand stretch

Consumers expect more from brands than ever before, demanding interaction across multiple occasions and channels to meet their needs in that particular moment or mood. For example, Deliveroo have gone from providing delivery for established restaurants to supporting small street food start-ups, cementing their commitment to greater choice for their customers. It's currently trialling 12-week pop ups for four small food businesses at its Canary Wharf base, with the chance to extend if they prove

successful<sup>xl</sup>. Not only does this extend the brand's offer from a range point of view, it creates synergy with Millennial and Gen Z consumers who are increasingly apathetic towards big brands.

Greggs is another example of how brand perception can continually improve with focused NPD, new channels and formats. Coupled with a rewards smartphone app that gives loyal customers a free coffee, a treat on their birthday and the chance to be entered in to prize draws,

And in the grocery sector, Iceland's Food Warehouse offering more upmarket products such as ostrich and kangaroo steaks proves the brand is about more than frozen fish fingers.

## Blended experience

Ease of access looks set to continue to be a focus for shoppers across all sectors and demographics, with click and collect extending to non-food brands like Zara, which is trialling collection at its Westfield store. Creating blended online and offline

experiences will be essential too – clothing brand Superdry recently launched online ordering for pick-up in store, where the customer can then try their selected styles, select different colours or sizes if needed and update their bill accordingly.

## Using what you've got

But it's about evolution, not revolution; being creative in the resources available to you. Building on its 'deliver to fridge' trial, Walmart last year announced it would be using store employees to deliver packages on their commute home, overcoming some of the geographic issues that have previously been a barrier to wide-spread home delivery in the US.

"Walmart has strength in numbers with 4,700 stores across the U.S. and more than a million associates," said Walmart's head of e-commerce Marc Lore<sup>xli</sup>.

"Our stores put us within 10 miles of 90 per cent of the US population. Now imagine all the routes our associates drive to and from work and the houses they pass along the way".

As competition across both food and non-food continues to be fierce, brands that innovate in terms of both product, tech and experience are sure to be the winners.

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## About Sun Branding Solutions

At the heart of Sun Branding Solutions is a team of brand, innovation and packaging experts, drawn from five different specialisms but with one shared focus; creating the very brightest ideas for brands.

Each team, whether it's strategic design, pack science, graphics, legal or digital, is brilliant in its own right, and you can work with one, two, or as many as you need to get your big idea off the drawing board and into your customer's shopping basket. But it's when the teams come together that we're at our very brightest.

Our experts' combined experience and insight, gathered from many years working with big name brands and retailers, is what shapes the way we work - with our clients and with each other.

Because even if one specialism isn't directly working on your project, their insight and knowledge of your market has gone in to shaping what we deliver, and how. That means more creativity, more innovation and more for your money.

Our experts are brighter together, and with them on your side, your brand will shine brighter too.

For more news, views and insight, log on to  
**[www.sunbrandingsolutions.com](http://www.sunbrandingsolutions.com)**

### Want to chat about a project?

Give us a call on 01274 200700 or  
email **[hello@sunbrandingsolutions.com](mailto:hello@sunbrandingsolutions.com)**



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