

DIAGEO

DISTILLED: A DIAGEO FORESIGHT REPORT

Navigating trends,
shaping tomorrow

DECEMBER 2023



INTRODUCING THE FUTURE

Welcome to *Distilled*, a Diageo foresight report that sets out the most pressing consumer trends facing brands today, regardless of industry or region. Backed and supported by the Diageo *Foresight System™* - a powerful new tool monitoring and tracking online conversations around the world - *Distilled* has been designed to help brands create a strategy that will prepare them for tomorrow.

“I’m delighted to invite you on this journey. To be the world’s best brand builder, Diageo knows that we must champion curiosity and drive a deeper understanding of our consumers in all of our markets.

To be entrepreneurial in mindset and action, brands mustn’t be afraid to look beyond their own walls. With *Distilled*, I hope that brands find Diageo’s insights a useful tool for planning future innovation, and that it encourages greater collaboration between us and the wider world so we can continue to learn.

There are plenty of opportunities for brands to win in 2024 and beyond, and adapting to these trends that are driving consumer behaviour will be essential to this. Enjoy the read, and see you in the future.”



MARK SANDYS

Chief Innovation Officer, Diageo



GILES HEDGER

Global Consumer Planning Director, Diageo

“Socialising is the wider behavioural ‘category’ that drives Total Beverage Alcohol (TBA) consumption - it’s the fuel that powers the engine. At Diageo, our ambition is to understand socialising better than any company on Earth, and to do so we need to understand the forces that are shaping it.

Distilled is powered by our proprietary *Foresight System*. This is the ‘Hubble Telescope’ of Diageo’s insight work. It allows us to detect and track long term consumer shifts, and approach our marketing and innovation ‘future-back’.

This, in turn, is part of a comprehensive suite of interoperable tools that together ensure our consumer understanding is second to none. Diageo’s total insight capability stretches from slow moving macro shifts to fast moving micro signals; from psyche and sentiment to behaviour and spending; from TBA specifics like occasion and serve, to social adjacencies like music, food & entertainment; from here in the now, to tomorrow and beyond.

Every corner of the map is critical, as we continue to shape the future of social celebration.”



The *Foresight System* is a powerful tool developed by Diageo and our data and insight partners. It monitors and tracks global conversations from a wide range of web sources and social media platforms, to provide insight into how consumer trends are developing across the world.

This highly sophisticated listening service uses supervised learning and AI modelling to track and monitor conversations, group them into trends and sub-trends that we will explore in this report, and quantify them into a propriety dashboard that allows Diageo to track in real-time.

Combining cutting-edge data from the *Foresight System* with Diageo's consumer insight expertise, *Distilled* is an essential tool for brands wanting to future-proof themselves by understanding what consumers are talking about around the world.

Combining cutting-edge data from the *Foresight System* and penetrating foresight from our consumer insight experts, we're not just tracking conversations; we're decoding the evolving nature of social interactions.

The Diageo *Foresight System* isn't a passive observer; it's an active influencer, shaping our day-to-day activities and strategic decisions."

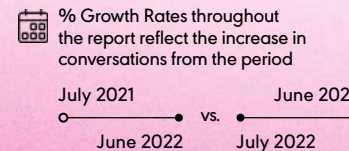
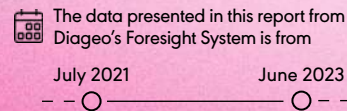


ALBERTO ROMANO
Foresight System Lead

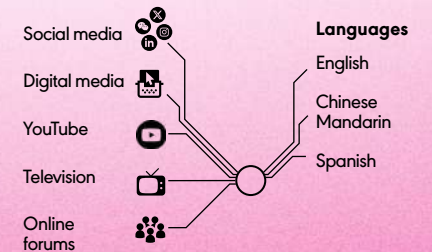
Every trend in this report has been broken down into three levels:



Timeframe



Sources



THE METHODOLOGY

Introducing the *trends* that are driving today's consumer:

→ **NEO-HEDONISM**

Brands and products for a *Meaningful Life*

1.4M
Conversations

+39%
Growth rate

→ **BETTERMENT BRANDS**

Brands and products for a *Better World*

5.6M
Conversations

+44%
Growth rate

→ **CONSCIOUS WELLBEING**

Brands and products for a *Balanced Life*

4.3M
Conversations

+30%
Growth rate

→ **EXPANDING REALITY**

Brands and products for a *Digital World*

4.6M
Conversations

+94%
Growth rate

→ **COLLECTIVE BELONGING**

Brands and products for an *Inclusive and Connected World*

28.7M
Conversations

+41%
Growth rate

NEO- HEDONISM

Brands and products for a *Meaningful Life*

In the realm of indulgence, a fascinating trend is unfolding – *Neo-Hedonism*. While traditional pursuits of luxury and excess still hold their allure, consumers are expanding their definition of hedonism, seeking new and innovative ways to experience pleasure in their everyday lives.

Neo-Hedonism is all about infusing the everyday with sensorial delights. Whether it's enjoying a culinary masterpiece, basking in the beauty of nature, or connecting with loved ones in innovative spaces.

As financial challenges loom, consumers are re-evaluating their relationship with luxury and status. *Neo-Hedonism* however gives rise to democratized forms of indulgence, where people seek meaningful experiences rather than ostentatious displays of wealth.

60%

of Millennials and Gen-Zers prefer to spend money on life experiences (e.g. traveling & concerts) rather than saving for retirement

(Source: [Experian](#))

150M

monthly active users are now on Discord, the instant messaging platform, which has doubled its usage within the past year

(Source: [Discord](#))

\$212.75BN

is the value of Global EcoTourism market, which is expected to grow by 14.7% from 2023 to 2032

(Source: [Spherical Insights](#))



TRACKING THE TREND

Neo-Hedonism is deeply relevant in a world where balance and authenticity are prized over excess. It reflects a desire to find joy in the everyday and connect with our surroundings in more meaningful ways. This trend invites us to reimagine pleasure, transforming it from a fleeting pursuit of extravagance to a sustained appreciation of the present moment.

WAYS IN VIA THE MICROTRENDS

Brands that need a way in to *Neo-Hedonism* can embrace the following microtrends and engage with consumers wanting to expand experiences of indulgence and pleasure.

Unique Products & Experiences

After enduring a pandemic-induced sensory deprivation, consumers are yearning to redefine indulgence and elevate their lives. They are looking for unique products and experiences that transcend the ordinary. This sub-trend, our fastest-growing 'Ways In', represents a departure from the mundane and embraces the extraordinary.

Alternative Social Spaces

Consumers are reimagining the very essence of socialising. Dynamic venues and evolved occasions provide a canvas for them to shape novel and memorable experiences, nurturing an environment that fosters genuine connections and enriching social interactions.

On-the-go Products

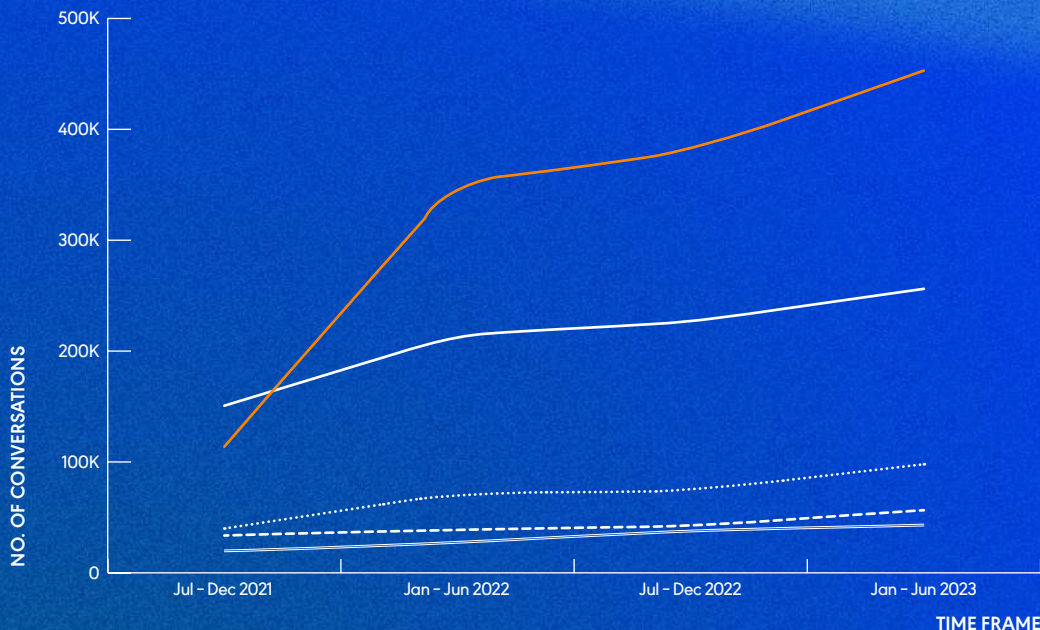
As travel and exploration return, a growing cohort of consumers are seeking novel ways to see the world, craving local experiences, personal fulfilment, and nature-driven adventures. Their thirst for measured risk-taking and immersive encounters fuels demand for on-the-go products and services - from ready-to-drink cocktails to services that connect consumers directly with nature.

Indulgence for All

As the concept of luxury evolves, consumers want accessible, inclusive, and more frequent indulgences that resonate with broader audiences. This true democratisation of luxury means making once-exclusive experiences and products available to a wider demographic, inviting more people to partake in the pleasure of indulgence.

Tracking the conversation around *Neo-Hedonism*:

July 2021-June 2023



Conversations Growth rate YOY

Neo-Hedonism Total	1.4M	+39%
Alternative Social Spaces	848K	+32%
On-the-go Products	284K	+53%
Indulgence for All	171K	+36%
Unique Products & Experiences	128K	+72%



On-the-go Products

Guinness Nitrosurge uses ultrasonic technology to deliver beautiful smooth Guinness time after time, allowing consumers to enjoy the beautiful two-part pour of a pint of Guinness wherever they are, whether it is at home or on-the-go.



Alternative Social Spaces

Across the world, Casamigos is renowned for taking over unique social spaces. Its pop-up beach bars bring a taste of Mexican tequila to consumers worldwide, from Sundance Film Festival to Amsterdam's W-Hotel, Jumbay in Antigua to All Points East Festival.

BREAKING DOWN THE WAYS IN

Within each *Ways In*, what are the specific topics of conversation that consumers are talking about?

- MOST DISCUSSED CONVERSATIONS**
(Highest volume, with steady growth)
- GROWING CONVERSATIONS**
(High volume, with high growth rate)
- EMERGING CONVERSATIONS**
(Growing volume, with high growth rate)

Unique Products and Experiences



Products and Inventions

that are designed to enhance sensory experiences

Alternative Social Spaces



Socialising Spaces

for people to come together and connect with likeminded individuals

On-the-go Products



On-the-go accessories

that cater for consumers desire for local experiences, measured risk-taking, and nature-driven adventures

Indulgence for All



Ultra Luxury

the pinnacle of opulence, going beyond the standard definition of luxury



REGIONAL CONVERSATIONS

Within *Neo-Hedonism*, what are the trending topics of conversation around the world?

NORTH AMERICA **+38%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Becoming a Digital Nomad **+112%**
Resources like co-working spaces are seen as essential tools as more people adopt remote, nomadic work for global exploration

Pop-Up Bars **+82%**
Pop-up bars have become popular, convenient, and cost-effective options to enjoy a quick drink

On the Go Accessories **+56%**
Camping, hiking, and tenting are capturing hearts, providing an escape to nature's tranquility

EUROPE **+46%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Immersive Experiences **+52%**
Immersive art exhibitions are seen as a top-most discussed theme in the region, emphasising the desire for multi-sensory artistic encounters.

Nomad Policy **+53%**
European countries are attracting digital nomads through various policies, with reports suggesting that London is leading the charge

ASIA PACIFIC **+35%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Pop Up Bars **+88%**
Community culture plays a significant role in the realm of drinking, marked by innovative developments like tokenised access to experiences

Nomad Cost of Living **+83%**
Consumers discuss the cheapest countries to be a digital nomad, with brands providing tips to travel in the current environment

Multi-sensory **+76%**
360 degree exhibits and interactive engagement within tourism and art widely promoted

LATIN AMERICA & CARIBBEAN **+35%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Dining Experiences **+63%**
Attractiveness, service quality, presentation, and overall ambience are discussed as important attributes to fine-dining experiences

Nomadic Experiences **+99%**
Latin America, particularly Mexico City and Costa Rica, is seen as a popular destination for digital nomads seeking adventure and work-life balance

Immersive Experiences **+73%**
From museum exhibitions to brand promotions, consumers are enjoying interactive and immersive displays and experiences

AFRICA **+55%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Virtual Events **+128%**
Events and bars are offering immersive experiences that engage multiple senses, including virtual reality tours

Nomadic Experiences **+55%**
Digital nomad lifestyle is very popular in the region, with those welcoming Namibia's Digital Nomad Visa

Affordable Luxury **+105%**
Affordable luxury has shifted to perfumes, jewellery, bags and clothing, as opposed to fine dining, hotels and vacations

BRAND SPOTLIGHTS

We've spotlighted several external brands, and one Diageo brand, that are helping consumers seek *meaningful experiences*.



Aupen

Bag brand Aupen is paving the way when it comes to 'quiet luxury'. Founded in Singapore and sported by celebrities including Taylor Swift, Kylie Jenner and Gabrielle Union, Aupen is a sustainable and ethical label founded on the principles of mindfulness and self-care. Its affordable price point caters for consumers looking to achieve the A-list look without breaking the bank.

Discover more:
www.aupen.com



Pasta Evangelists

In 2016, Pasta Evangelists' set out to bring the pasta the founder grew up making by hand with his nonna in Italy to British kitchens. The company has since delivered the UK's freshest, artisan pasta to the doors of more than one million homes. Pasta Evangelists offer at-home delivery pasta originating from across Italy's 20 regions, with weekly-changing menus and ingredients sourced seasonally and sustainably from a network of local Italian farmers and growers. Since launching, Pasta Evangelists has expanded to meet consumer demands for indulgent and immersive experiences with their Pasta Academy - including masterclasses, tasting and parties - and luxury Harrods Pasta Bar.

Discover more:
www.pastaevangelists.com



House of Yes

House of Yes is a nightclub and performing art space in the heart of Brooklyn, known for wild parties with innovative themes, circus performers, burlesque dancers and more. Founded by artists Anya Sapozhnikova and Kae Burke, it is a creative collective designed as a temple of expression and known for being an ally to the LGBTQIA+ community, with a strict pro-consent policy. Partygoers can expect experiences that transcend the ordinary, with evening themes including 'Hot Mess - Drag Competition' and 'Animal Masquerade'.

Discover more:
www.houseofyes.org



Don Papa: Sugarlandia

Sugarlandia, the spiritual home of *Don Papa* Rum, is an enchanting place inspired by the island of Negros in the Philippines. It is a place that transcends time, embracing the lush, fertile landscape where sugarcane thrives, with its dense rainforest overshadowed by the majestic volcano Mount Kanlaon. As well as its vibrant wildlife, the people of Sugarlandia add soul, personality, and a unique sense of style to this extraordinary world described quite fittingly by Don Papa as "odd but very marvellous".

Across the globe, *Don Papa* is dedicated to bringing this Sugarlandia-inspired vibrancy to every event it hosts. Whether it is a bar or club, each Don Papa event is a meticulously crafted experience that transports consumers to Sugarlandia through intricate storytelling, captivating visuals, and, of course, its premium Rum.

This interactive approach to consumer experiences strives to heighten senses, with its symphony of flavours, scents, and sensations ensuring that consumers have a different experience every time they travel to Sugarlandia. The brand's commitment to alternative social spaces was exemplified through its immersive Gayuma launch in Amsterdam, which encapsulated the shamanistic ideologies of the island of Siquijor to provide an ever-changing, unique experience for every attendee.

Don Papa strives to honour its brand roots in every event it does, bringing different aspects of Filipino culture to life every time.

To find out more about Don Papa Rum and the Sugarlandia world, visit:

<https://www.donpapurum.com/>

Neo-Hedonism 2024

SEEKING PLEASURE IN NOVEL WAYS

Neo-Hedonism is poised for growth, reflecting consumers' increased pursuit of pleasure in new and diverse ways, within their budget. As consumers embrace a pleasure-centric lifestyle that includes adventure, personalised luxury, and hedonistic eco-consciousness, this trend will continue to evolve in the coming year, redefining indulgence for both brands and consumers.

What consumers will be looking for in 2024:

Joyful Living

Consumers will be constantly searching for novel experiences that bring happiness to every facet of life, whilst also prioritising their wellbeing and mental health. Consumers desire pleasure in unconventional places and times, challenging traditional norms of when and where happiness should be found.

Wanderlust Redefined

The exploration and adventure trend will continue to captivate consumers, with local travel, nature-driven escapades, and curated staycations taking centre stage. The insights contained within this report show a consumer shift towards more intentional and mindful approaches to adventure, valuing unique experiences that contribute to a sense of discovery and personal growth.

Individualised Luxury

Consumers are being driven by a desire for personalised experiences that align with unique tastes, drawn to products and services that allow consumers to savour life's pleasures in their own distinct way. Premium experiences are today not defined by expense but by their ability to cater to individual preferences, showcasing a shift towards a more curated approach to luxury.

How brands can engage in 2024:

Become Emotional Architects

There's an urge for brands to step into the roles of "emotioneers" and "sensory architects", focusing on creating immersive narratives that resonate emotionally with consumers whilst establishing a deeper connection through engaging and multi-sensory experiences.

Reimagining Social Spaces

Brands need to invest in alternative social spaces that offer distinctive experiences. Whether it is through embracing pop-up events, themed venues, or dynamic gathering spots, this trend signals an opportunity for brands to curate unique, shareable moments that reflect a consumer's quest for meaningful social interactions.

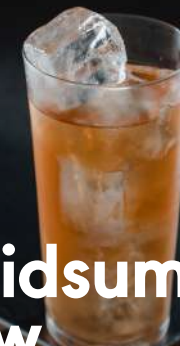
Pleasure for All

With increasing numbers of consumers searching for hedonistic experiences, brands must play a major role in continuing this democratisation of pleasure and ensuring experiences are accessible to broader audiences. Whether it is through creating affordable luxury offerings or budget-friendly multi-sensory experiences, brands need to ensure they make indulgence inclusive and attainable.

We asked Diageo World Class Global Bartender of the Year 2023, Jacob Martin, to bring this trend to life as a cocktail.

COCKTAIL

A Midsummer Snow



INSPIRED BY

Jacob Martin

World Class Bartender of the Year 2023

Ultra-premium cocktail A Midsummer's Snow is for those pleasure-seeking consumers looking to inject luxury into their everyday lives.

RECIPE/INGREDIENTS:

- 30ml Don Julio reposado
- 20ml cacao blanco vermouth
- 7.5ml fino sherry
- 15ml recomposed grapefruit verjus
- 7.5ml red bitter
- 7.5ml cacao blanc liqueur
- 10ml alo
- Dash of Himalayan sea salt

METHOD:

In a cocktail shaker, add all of your ingredients and ice

Using a strainer, throw cocktail

Fill a highball with large cubed ice

Pour in cocktail

Drink responsibly. DRINKIQ.com



DIEGO INFANTE

*Global Consumer
Demand Insight Lead*

BETTERMENT BRANDS

Brands and Products for a *Better World*

Consumers are increasingly eco-conscious, becoming more aware of the environmental impact of their choices, and are seeking ways to align their purchasing decisions with their values and habits.

Enter the rise of *Betterment Brands* – businesses that embrace sustainability and responsibility as core values, offering guilt-free consumption.

No longer is it enough for organisations to simply provide a good or service. Consumers today are seeking brands that offer high-quality products whilst demonstrating a commitment to social and environmental responsibility.

81%

of people believe that social media has increased pressure on businesses for ESG accountability

(Source: [Sprout Social](#))

63%

of consumers believe high prices are the main obstacle to adopting sustainability

(Source: [Deloitte](#))

+90%

of S&P 500 companies report on ESG

(Source: [McKinsey Sustainability Report](#))

TRACKING THE TREND

The booming *Betterment Brands* trend represents a transformation in consumer expectations, pushing companies to re-think their strategy and purpose. By embracing new technology, material, ingredients and textures, these brands are responding to consumer demand and providing individuals the opportunity to make planet-positive choices.

WAYS IN VIA THE MICROTRENDS

Brands that need a way in to *Betterment Brands* can embrace the following microtrends and drive positive change for the environment, society, and communities.

Net Zero & Sustainability

Consumers are looking beyond products to consider the entire supply chain when purchasing. In response, innovative brands are rethinking how their products and packs are sourced, made, delivered and re-inserted into a circular economy.

Local Wealth

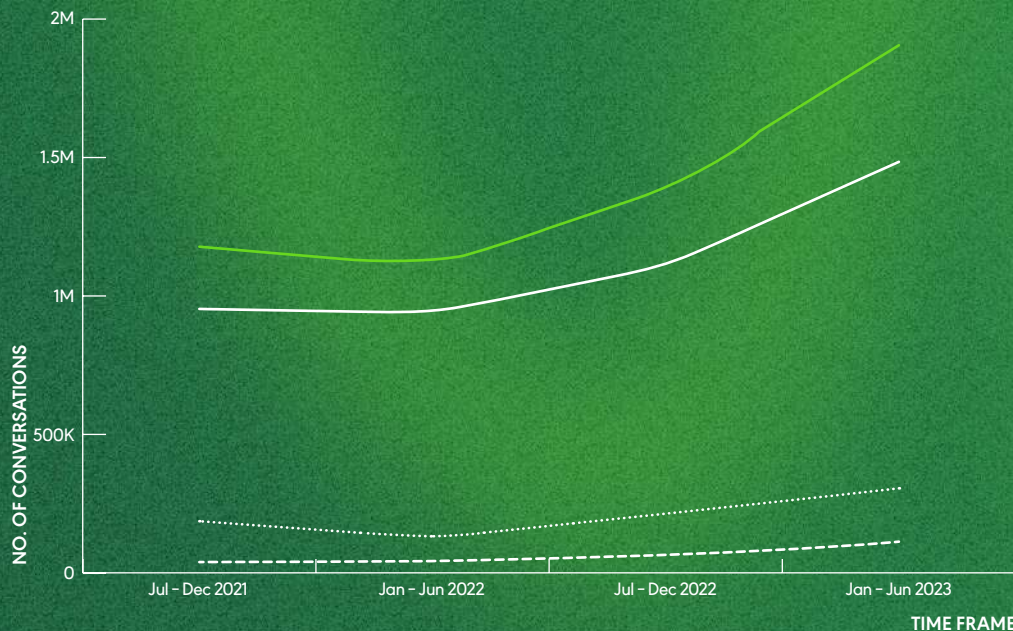
Increasingly consumers are looking to support local businesses and economies. They are seeking brands that prioritise community impact and contribute to the wellbeing of their local areas through creating jobs, sourcing from local suppliers and communities or charity partnerships.

Social Change & Ethics

The fastest growing of our 'Ways In', people are more aware than ever of social disparities globally and are looking for brands that demonstrate a genuine commitment to tackling key social inequality.

Tracking the conversation around *Betterment Brands*:

July 2021-June 2023



Conversations Growth rate YOY

Betterment Brands Total	5.6M	+44%
Net Zero & Sustainability	4.5M	+37%
Local Wealth	837K	+65%
Social Change & Ethics	257K	+119%

Net Zero & Recycling

GODAWAN For every bottle of Indian whisky brand *Godawan* that is sold, the brand pays homage to the beautiful but dwindling Great Indian Bustard bird of which there are only 150 left in the country, raising awareness for the environmental conservation and ecological preservation of the bird.

Local Wealth

Zacapa In Guatemala, Diageo works with over 500 women, through the *Cooperativa Rey Quiché*, who make the hand-crafted 'petate' bands that adorn every bottle of our *Zacapa 23 Rum*, providing more than just an income for these women but allowing them to work from home and spend time on their other responsibilities

BREAKING DOWN THE WAYS IN

Within each *Ways In*, what are the specific topics of conversation that consumers are talking about?

- MOST DISCUSSED CONVERSATIONS**
(Highest volume, with steady growth)
- GROWING CONVERSATIONS**
(High volume, with high growth rate)
- EMERGING CONVERSATIONS**
(Growing volume, with high growth rate)

Net Zero & Sustainability



Circular Economy

by extending the life of products through recycling, re-using and repairing



Carbon Footprint

a focus on reducing environmental impact e.g. reducing electricity consumption



Supporting Local Businesses

with an emphasis that small businesses are drivers for economic progress

Social Change & Ethics



Inclusivity

particularly in support of LGBTQIA+ rights and combatting racism

+16%
Growth rate

625k
Conversations

+6%
Growth rate

625k
Conversations

+27%
Growth rate

297k
Conversations

+19%
Growth rate

325k
Conversations



Renewable Materials

with a particular focus on the future of renewable energy

287k **+32%**



Nature Conservation

highlighting the protection and restoration of habitats and ecosystems

36k **+42%**



Labour & Environmental Regulations

with new laws to protect environmental and societal standards

44k **+11%**



Brand Partnerships

to promote community development, economic growth and sustainability

16k **+42%**



Hyper-Local Impact

supporting communities, local economies and the environment

250k **+25%**



Social Responsibility

actively engaging in initiatives and practices to benefit communities

15k **+17%**

Sustainable Supply Chain

with calls to ensure sustainable practices throughout the supply chain

109k **+19%**

Offers & Rewards

including incentives for consumers to drive local economic well-being

5k **+20%**

Human Rights

safeguarding the well-being and rights of workers

+48% **48k**

REGIONAL CONVERSATIONS

Within *Betterment Brands*, what are the trending topics of conversation around the world?

NORTH AMERICA **+36%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Waste Conversion **+93%**
Initiatives such as converting waste tires, glass bottles or wooden houses were discussed

Affirmative Action **+87%**
Consumers are being urged to curb plastic production

Circular Economy **+82%**
Recycling is a major discussion point, with a focus on bottles, electronics, packaging, and zero waste initiatives like converting waste tires and glass bottles

EUROPE **+24%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Recycling **+82%**
Organisations suggested innovative ways to achieve circular economy, such as refills, industrial waste mapping and digital passport products

Carbon Footprint **+67%**
The large carbon footprints of household products and businesses, particularly in the UK, and initiatives to reduce waste were discussed

Affirmative Action **+49%**
Renewable energy is seen as an obvious answer to reducing carbon emissions

LATIN AMERICA & CARIBBEAN **+31%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Affirmative Action **+92%**
There are growing calls to adopt company recycling initiatives, from increasing recyclability of packaging to programmes around recycling glass bottles

Recycling **+89%**
Consumers are increasingly switching out plastic bottles, single use plastics, and plastic waste

Gender Equality **+82%**
Company initiatives for gender equality across the region, including increasing representation of women in the workforce, were welcomed

AFRICA **+68%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Waste Management **+65%**
Waste management is seen as a major issue, with private waste collectors asked for their support and fashion brands using tech to cut down on fabric waste

Local Businesses **+57%**
Initiatives and grants by organisations and governments were highlighted, including Kwara State Governor's grant to at least 4000 artisans to support their businesses

Recycling **+34%**
Recycle and reuse was discussed heavily, including business initiatives around recycling bottles and cans

ASIA PACIFIC **+70%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Gender Equality **+83%**
The inclusion of women and upholding their rights in Pakistan and India was widely discussed, with brand-led initiatives highlighted

Disposal of Waste **+81%**
Single-use plastic became a key talking point in India after Prime Minister Narendra Modi wore a jacket made from single-use plastic

Local Businesses **+73%**
Government schemes in India were set up to aid and boost local economies and communities

BRAND SPOTLIGHTS

We've spotlighted several external brands, and one Diageo brand, that have encouraged consumers to make more *sustainable choices*.



Divine Chocolate

Divine is a global social enterprise committed to making delicious chocolate that fights exploitation. The company is co-owned by Kuapa Kokoo Farmers' Union, a co-operative of over 100,000 cocoa farmers in Ghana, with 40% representation on the board, their stake being a first in the Fairtrade World. For over two decades, Divine Chocolate and Kuapa Kokoo have been making quality chocolate whilst supporting local community initiatives aimed at empowering women, adult education, and good governance.

Discover more: www.divinechocolate.com



Reform Studio

Reform Studio is an award-winning design studio based in Egypt that is on a mission to promote the use of sustainable materials for everyday items like fashion and furniture. The brand exemplified this commitment by pioneering the invention of a new material, Plastex, an eco-friendly material that is made by weaving discarded plastic bags. All Reform products and designs originate from this concept, with the brand also dedicated to empowering women in its local, rural areas who have less opportunities when it comes to supporting their families.

Discover more: <https://reformstudio.net>



Carbon Fingerprint

Carbon Fingerprint is on a mission to delete digital carbon from consumers' screentime and "build a world worth putting your phone down for". Through Carbon Fingerprint's website, consumers can measure how much digital carbon their screentime creates each month, sign up for a membership plan that will connect them with trusted carbon removal projects, and certify their environmental impact. The brand wants to remove 1 billion tonnes of CO2 from the air every year by 2030, with their carbon removal partners - currently One Tree Planted and Climeworks - directly capturing carbon, removing it from the atmosphere, and turning it into wood and stone.

Discover more: www.carbonfingerprint.io



The Tequila Don Julio Fund

Tequila *Don Julio* was founded nearly 80 years ago by Don Julio v, an entrepreneur who was devoted to the land and his craft all while taking care of his own within his hometown of Atotonilco El Alto, Mexico. Fast-forward to today and celebrating Don Julio González's legacy is deeply rooted in the brand's mission, particularly the focus on helping the local communities that bring the brand to life, including in Atotonilco Al Alto where the brand still produces its tequila. This commitment gave life to The Tequila *Don Julio* Fund, which was established in 2021 and is just one way for the brand to give back. With the ambition of investing \$1 million over the next four years in approved charities, Don Julio is determined to have a positive impact on the economies

and communities in which it operates.

The fund's 'Hispanic Heritage Month' programme, based out of North America, extended this commitment, opening its resources to Hispanic entrepreneurs across the U.S. who are following their heart like Don Julio González did, or as the brand calls it; 'por amor'. The programme awarded five business owners with a \$20,000 grant and business support, including Vamigas, a beauty company that uses ancestral secrets and local, natural ingredients to counter the disproportionate exposure that Latinas face to harmful chemicals in beauty products.

As well as its commitment to championing local communities, *Don Julio* is working hard to make a sustainable impact across Mexico, with its commitment to water leading to the brand receiving an ARA certification in 2021 for its work in making its tequila production free from deforestation. But through everything it does, *Don Julio* is dedicated to empowering the next generation of 'Dons' and 'Doñas', ensuring that it gives back to the thriving Hispanic community that has given the brand so much.

You can read more about *Don Julio* and its commitment to Diageo's ESG-agenda here: <https://www.diageo.com/en/our-brands/brand-explorer/don-julio>

Betterment Brands 2024

A PATH TO PURPOSEFUL CONSUMPTION

Betterment Brands will play an even more pivotal role in the consumer landscape during 2024, with this a fundamental change in consumer expectations. In the next year, the *Betterment Brands* trend will continue to shape how consumers perceive and engage with brands as they strive to create a positive impact on the world.

What consumers will be looking for in 2024:

Socially and ecologically friendly initiatives

Consumers are making more conscious choices in their daily lives that are aligned with their personal values and beliefs. They will seek out products and services that support eco-friendly solutions and hold companies accountable for their social impact.

Creator Communities

Consumers today have also become creators of products and experiences, with local and community-based production on the rise. This has the potential to further promote sustainability, empowering consumers to take an active role in production and consumption, and encourage a positive change.

Sustainable Incentives

In today's economic environment, consumers will not sacrifice price and quality when it comes to buying sustainable products. Consumers will be looking for incentives through additional benefits, discounts or even membership options, turning good intentions into actions.

How brands can engage in 2024:

Transparency

As NGOs and governments work on tighter regulations, consumers have also become more wary about what goes on behind-the-scenes of brand's actions. Transparency in business practices will be a cornerstone for brands, who will need to provide clear and verifiable information about their environmental and social commitments.

Purpose-Driven Initiatives

When considering purpose-born marketing campaigns, brands must ensure that it truly matches who the brand is and what it represents. Sustainability-focused initiatives need to be tied to the brand's core, creating holistic sustainable solutions that cater not only to the benefit of the planet but also to consumer's luxury and wellbeing habits.

Close the say-do gap

Consumers are actively engaging in conversations about Betterment Brands, yet we still find that when it comes to making more sustainable choices consumers have other priorities, such as price, availability, and overall experience. Brands must focus on closing this say-do gap by giving consumers the ability to make sustainable choices, removing physical barriers and making this trend the social norm.

We asked Diageo World Class Global Bartender of the Year 2023 judge and No. 1 50 Best Bar 2022 winner Giacomo Giannotti to bring this trend to life as a cocktail.



COCKTAIL

Roots

INSPIRED BY

Giacomo Giannotti
Paradiso, Barcelona

Roots is for the eco-conscious consumer looking to cut down on waste. Its ingredients – from soil to micro-herbs – pay homage to Mother Nature and the concept of agriculture.

RECIPE

- 30ml Ketel One infused with local soil (sterilised)
- 65ml verbena and peas cordial
- 100ml Roses soda
- 10ml lemon juice
- Garnish: peas & micro herbs

METHOD:

In a highball glass, combine the Ketel One infused vodka with the cordial
Next add the lemon juice and cubed ice
Finally add the rose soda and garnish
Do not shake or stir

Drink responsibly. DRINKIQ.com



JAVIER CAMINO
Global Culture and Futures Planning Director

CONSCIOUS WELLBEING

Brands and Products for a *Balanced Life*

From economic pressures to environmental challenges, our fast-paced and interconnected world is causing consumers to face an unprecedented array of stressors. In response to these growing concerns, a powerful trend is emerging – *Conscious Wellbeing*.

People across the globe are placing greater emphasis on their personal wellbeing, recognising the need to prioritise not only their physical health but also their psychological, emotional, sexual, social, and financial wellbeing. Moments of calm and relaxation have become rare treasures.

The pandemic-era likely acted as a catalyst, accelerating a societal shift towards a more comprehensive view of health and wellbeing. People are seeking not just fleeting moments of happiness, but sustained contentment and fulfilment in their daily lives, prioritising self-care, mindfulness, and emotional resilience.

\$38.5BN

how much the global functional and natural health food market is projected to be valued at in 2033

[Source: Statista]

\$8.5TN

the size that the wellness economy is expected to reach in 2027, growing 8.6% annually over the next five years

[Source: Global Wellness Institute]

78%

of consumers think their mental health is as important as their physical health

[Source: Ipsos]



TRACKING THE TREND

Conscious Wellbeing reflects a transformation in our understanding of what it means to be healthy and happy. Brands and businesses that recognise and cater to these evolving needs are finding themselves at the forefront of a movement that is shaping the future of health and happiness.

WAYS IN VIA THE MICROTRENDS

Brands that need a way in to *Conscious Wellbeing* can embrace the following microtrends and meet consumer demands and their wellbeing goals.

At-home and Near-home Sanctuaries

People are creating havens within their homes that emulate the comforting experiences of the outside world. By curating their surroundings to encompass all they need, they find convenience and tranquility without venturing far from their home.

Substitute & Expanded Products

Consumers are selecting products not only for nutritional benefits but also for mood-enhancing and mental well-being properties. This trend expands to other product categories like fashion (smart materials) and technology (wearables), as consumers seek multifunctional solutions that go beyond basic attributes.

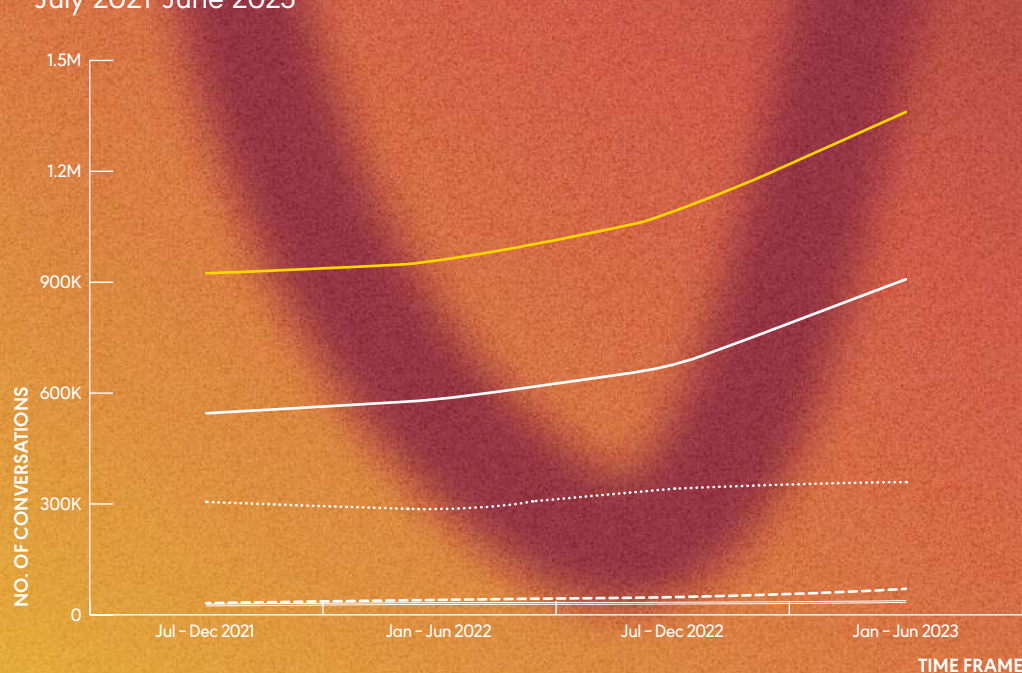
Decelerated Occasions

Amidst the whirlwind pace of modern life, a countermovement is emerging, urging people to savour moments at a slower pace and encouraging disconnection from the hustle and bustle. These newfound rituals foster enriched social interactions and provide opportunities to appreciate the simple pleasures in life.

Celebrating Self-Love

Consumers are embracing self-care and self-love, acknowledging the importance of physical, emotional, and mental health. This trend fosters a culture of self-acceptance and appreciation, emphasising the significance of mental wellness and positive self-image.

Tracking the conversation around *Conscious Wellbeing*: July 2021-June 2023



	Conversations	Growth rate YOY
Conscious Wellbeing total	4.3M	+30%
Celebrating Self-Love	2.7M	+40%
Substitute & Expanded Products	1.3M	+19%
Decelerated Occasions	190K	+62%
At-home and Near-home Sanctuaries	125K	+17%

Substitute & Expanded Products

AECORN APERITIVES

Non-alcoholic aperitif brand Aecorn is meeting consumer desire for an enhanced experience without the alcohol. Its three products have been designed to be enjoyed before ('Aecorn Bitter'), during ('Aecorn Dry'), and after ('Aecorn Aromatic') food and have inspired cocktails including the 'NOgroni'.

Celebrating Self-Love

BAILEYS

Earlier this year, Baileys launched 'Deliciously Light'. The popular drink now provides the same blend of Irish cream and traditional Irish whisky but with 40% less calories, giving consumers the perfect option for an afternoon treat when they can take a moment to themselves.

BREAKING DOWN THE WAYS IN

Within each *Ways In*, what are the specific topics of conversation that consumers are talking about?

- MOST DISCUSSED CONVERSATIONS**
(Highest volume, with steady growth)
- GROWING CONVERSATIONS**
(High volume, with high growth rate)
- EMERGING CONVERSATIONS**
(Growing volume, with high growth rate)

At-home and Near-home Sanctuaries



Cooking at Home

with consumers discussing the importance of healthy eating and trying new recipes

Celebrating Self-Love



Social Support Systems

with an increase in online and community support groups

Substitute & Expanded Products



Wellbeing Gadgets

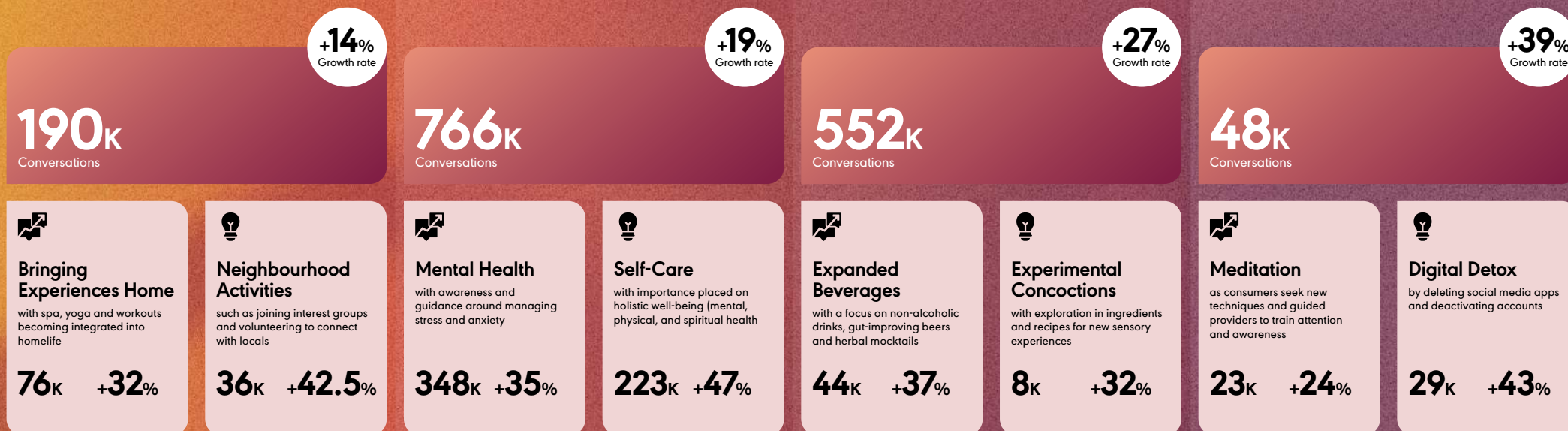
including fitness trackers and health monitoring wearables

Decelerated Occasions



Recreation

with a focus on activities to relax, unwind and rejuvenate



REGIONAL CONVERSATIONS

Within *Conscious Wellbeing*, what are the trending topics of conversation around the world?

NORTH AMERICA **+18%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Work Life Balance **+78%**
Consumers are looking to ensure they fit in leisure activities to their daily schedules, such as taking long walks

AI Fitness **+70%**
The benefits of health tracking devices are being acknowledged, however concerns have emerged over privacy and personal data sharing

Burnout **+47%**
"Bed rotting" was a trend sweeping TikTok in the context of self-care, with people, particularly Gen Z, choosing to stay in bed all day

EUROPE **+36%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Enhanced Nutrition **+65%**
Consumers note the importance of wearable sensors and apps for personalised diets, with start-ups that specifically address mental health gaining significant attention

Experience at Home **+43%**
At-home spa activities to foster relaxation, home workouts to support physical and mental health, and cooking at home are important ways consumers are creating havens at home

Functional Drinks **+41%**
Consumers are seeking non-alcoholic wine and zero-alcohol drinks

LATIN AMERICA & CARIBBEAN **+27%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Digital Detox **+78%**
Consumers are undergoing digital detoxes, by deleting apps or deactivating social media accounts

Therapy **+71%**
Individuals openly sharing strategies for supporting their mental health

AFRICA **+36%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Mocktails **+93%**
Popular non-alcoholic beverages were discussed

Meditation **+85%**
Consumers note the benefits of meditation, in hope of restoring mental health, sleep, and happiness

Self-Care **+78%**
People are engaging in volunteering activities to instil a sense of belonging

ASIA PACIFIC **+65%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Holistic Wellbeing **+85%**
Individual governments promoted initiatives for wellbeing, with the Pakistani government, for example, launching #Humraaz mental health app

Support Groups and Communities **+73%**
A shift is being acknowledged from an individualistic approach to self-care to a communal approach, termed "community care"

Working from Home **+41%**
Suggestions for maintaining a healthy work-life balance, preventing burnout and prioritising self-care

BRAND SPOTLIGHTS

We've spotlighted several external brands, and one Diageo brand, that have helped consumers reach their *wellbeing goals*.



Skin + Me

Skin + Me was launched in 2020 by a team of experts who wanted to remove complexity from the world of skincare and make it accessible for everyone, delivering consumers with a personalised solution that works for them. Customers complete an online skin consultation and submit photos of their face, before receiving a bespoke treatment plan based on their unique skin concerns and goals. By providing a unique skincare solution, Skin + Me is meeting the demands of people seeking a personalised approach to their self-care.

Discover more: <https://www.skinandme.com>



Dr Wills

Started in 2015 by a real-life doctor, Dr Wills is on a mission to help consumers enjoy the food they want without the hidden sugars and added junk. Its condiments - including Tomato Ketchup, BBQ Sauce, and Sriracha Hot Sauce - never contain anything artificial and are naturally sweetened with dates, tomatoes, and apples. Dr Wills is also committed to creating products that have the smallest impact on the planet, meaning their condiments are guilt-free for both the health and eco-conscious consumer.

Discover more: www.dr-wills.com



Panda Health

South African app Panda Health is committed to empowering people to be proactive on their mental health journey. Its mobile app allows users to get access to tailored content, assessments, and 1:1 therapy, as well as allowing people to join anonymous group sessions in forests and learn from others on topics ranging from anxiety to depression. Panda also provides proactive mental health care specifically for businesses and high-performance staff, as well as specifically for insurers.

Discover more: www.joinpanda.com

Captain Morgan®



Captain Morgan: Enjoy Slow

Captain Morgan is a brand centred on spice, individuality, and fun, and its recent 'Enjoy Slow' campaign championed these values while encouraging consumers to drink at their own pace.

'Enjoy Slow' was the brand's biggest-ever global responsible drinking campaign, and with the help of multi-award-winning singer, songwriter, and rapper Bree Runway, it called on people around the world to celebrate slower; to be confident to say no to a drink or another round if they wish and, ultimately, moderate their drinking.

With consumers set to develop new rituals to help build 'moments of deceleration' into their day, *Captain Morgan* is continuing its broader commitment to 'moderate drinking' with the launch of *Captain Morgan* Spiced Gold 0.0%, *Captain Morgan's* first alcohol-free offering. The accompanying campaign, 'Why you Whying', used humour to challenge the negative societal pressure of being asked 'why aren't you drinking?' when people choose a non-alcoholic beverage.

To read more about Captain Morgan, visit: www.diageo.com/en/our-brands/brand-explorer/captain-morgan

Conscious Wellbeing 2024

NURTURING HOLISTIC WELLNESS

As global stressors intensify, consumers are becoming more conscious of their overall health and happiness. *Conscious Wellbeing* signifies a significant shift towards holistic wellbeing, encompassing emotional, social, and psychological aspects of life, with this trend likely to evolve as both brands and consumers recognise this significance.

What consumers will be looking for in 2024:

Wellbeing Management

Consumers will be actively seizing control of their health, to the extent of even biohacking, with a constant search for tools that enhance not just physical health but also mental, social, and even spiritual wellbeing. This pursuit of a well-rounded, harmonious lifestyle is reshaping both digital and physical landscapes, reflecting a holistic approach to health solutions.

Mood-Boosting Food and Beverages

Consumers will continue looking for products that are designed not only for their nutritional value but also for their mood-enhancing properties. Expect a growth in nutraceuticals, functional foods, and adaptogenic beverages that can help consumers manage their mood.

Beauty Everywhere

Consumers are no longer content with surface level enhancements; they will crave products that go beyond aesthetics, offering a holistic approach that nourishes, rejuvenates, and elevates their natural beauty.

How brands can engage in 2024:

Understand your Role

Brands must understand what their role is in society's search for holistic wellbeing. Whether it is wellness-oriented food or clothing designed for comfort and emotional wellbeing, brands have the opportunity to shape the future by carving out unique and meaningful roles and purposes that resonate deeply with consumers' wellness lifestyle.

Tech for Health

We have seen a surge in mental health and wellness tech, which is a response to the escalating need for accessible resources. Brands must keep investing in the development of user-friendly apps, wearables, and online platforms that empower individuals with stress management, meditation, and emotional support.

Privacy and Transparency

However, as brands venture into health and wellness technologies, data management and privacy must take centre stage. The sensitive nature of health data demands rigorous privacy measures, and brands must ensure they implement transparent policies, informed consent mechanisms, and robust security protocols to comply with data protection regulations.

We asked Diageo World Class Global Finals Judge and World Class Global Bartender of the Year winner 2014 Charles Joly to bring this trend to life as a cocktail.



COCKTAIL

The Curtain Call

INSPIRED BY

Charles Joly

World Class Bartender of the Year, 2014

The Curtain Call is for those looking for a non-alcoholic option, as well as consumers who want to immerse themselves in bar culture whilst limiting their daily consumption.

RECIPE

- 25ml kumquat cordial (use any orange-type citrus)
- 100ml alcohol-free sparkling wine
- 50ml Seedlip Grove 42

METHOD

Combine Seedlip Grove 42 with cordial in a shaker or glass and stir
Pour mixture into a chilled champagne flute
Top with alcohol-free sparkling wine
Garnish with sliced kumquat and lemon twist

Drink responsibly. DRINKIQ.com



ANA DE LA GUARDIA

*Breakthrough Innovation
Global Head of Planning*

EXPANDING REALITY

Brands and Products for a *Digital World*

In today's increasingly digital-first world, the boundaries between the online and offline have blurred, giving rise to a trend known as *Expanding Reality*. With the maturation of digital infrastructure and widespread connectivity, our daily interactions span the digital and physical worlds seamlessly.

Technological advancements such as Virtual Reality, Augmented Reality, and Mixed Reality are revolutionising how we perceive and interact with reality. Coupled with increasingly interactive and immersive platforms, these technologies are shaping a new paradigm of experiences that transcend the traditional boundaries of the digital landscape.

Welcome to an emerging social 'phygital' space that has become a significant part of modern life; where online connections are as authentic and meaningful as in-person interactions.

865.2M

how many users the Esports market is expected to have by 2027

(Source: [Statista](#))

\$1.1TN

how much the global augmented reality market is projected to grow to by 2030

(Source: [Fortune Business Insights](#))

85%

of jobs that will exist in 2030 have not even been created yet

(Source: [Dell Technologies](#) and the [Institute for the Future](#))



TRACKING THE TREND

As we venture further into this *Expanding Reality*, we find ourselves exploring uncharted territories where the possibilities are endless. The lines between imagination and tangible experiences are blurring, changing the future of human experience in ways we could have never imagined before.

WAYS IN VIA THE MICROTRENDS

Brands that need a way in to *Expanding Reality* can embrace the following microtrends and engage with this reshaping world of socialising.

AI-enabled Relationships

Our fastest-growing 'Ways In', the rapid proliferation and widespread adoption of everyday technology has opened vast possibilities for brands and consumers. 'Internet of Things' devices, chatbots, and advancements in AI and Machine Learning have transformed the consumer experience, simplifying tasks and fostering a sense of constant connection.

Digitalising the Physical World

The digital world now holds as much importance as the physical. Consumers are experiencing products, services, and events in ways previously unimaginable – with digital concerts, merchandise and even worlds. Virtual consumption is gaining parity with its physical counterpart, as people embrace the seamless integration of both spheres.

Boosting the Creative Class

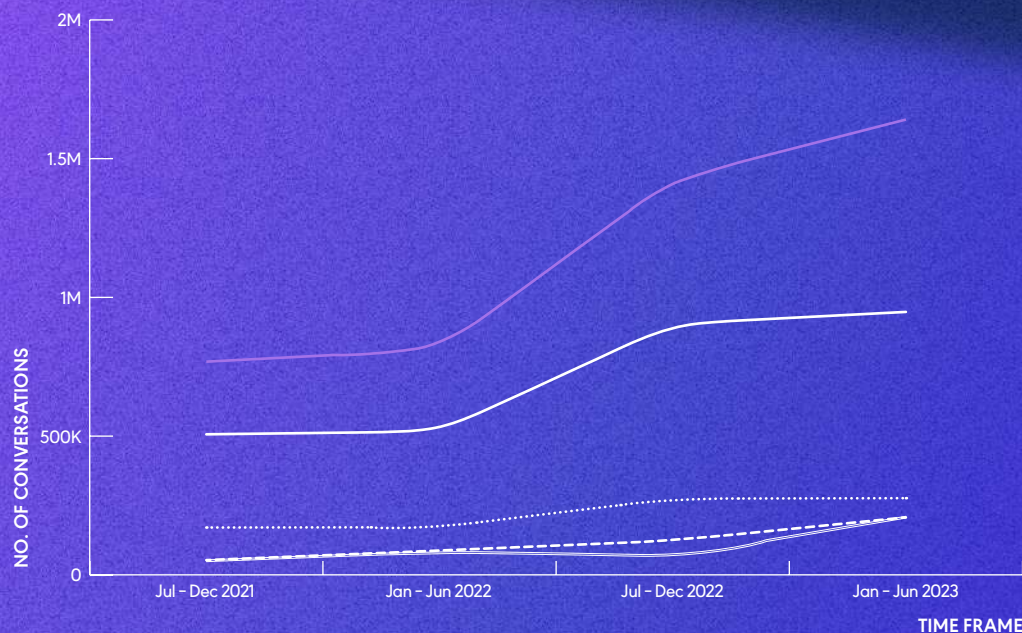
As digital tools become increasingly accessible and affordable, a surge of creative energy is manifesting in online environments. People are embracing their artistic potential, empowered by advanced digital platforms and tools, and giving way to a rise in concepts such as cryptoart and NFTs. The 'Creator Economy' brings a fresh and dynamic perspective to the creative landscape.

High-tempo Digital Experiences

The immersive and interconnected nature of the digital environment is redefining how consumers seek excitement and escape from everyday life. The digital space, with its vast array of experiences, is increasingly becoming a substitute for traditional high-tempo in-real-life events.

Tracking the conversation around *Expanding Reality*:

July 2021–June 2023



Conversations Growth rate YOY

Expanding Reality Total **4.6M** **+94%**

Digitalising the Physical World **2.9M** **+81%**

High-tempo Digital Experiences **893K** **+61%**

AI-enabled Relationships **471K** **+134%**

Boosting the Creative Class **409K** **+105%**

AI-enabled Relationships



Seedlip has created Elli, an AI-Enabled Cocktail Concierge that helps consumers learn about the brand's cocktails, how to make them at home, as well as teaching consumers about the brand's values.

High-tempo Digital Experiences



Guinness and Ripples partnered to create the 'Stoutie', a dedicated machine that prints selfies and other images on the head of a Guinness pint, delighting customers with a truly personalised product.

BREAKING DOWN THE WAYS IN

Within each *Ways In*, what are the specific topics of conversation that consumers are talking about?

- MOST DISCUSSED CONVERSATIONS**
(Highest volume, with steady growth)
- GROWING CONVERSATIONS**
(High volume, with high growth rate)
- EMERGING CONVERSATIONS**
(Growing volume, with high growth rate)

Digitalising the Physical World



Digital Marketplace

allowing consumers to buy and sell digital currency

AI-Enabled Relationships



AI-Powered Features

including personalised recommendations for shoppers

Boosting the Creative Class



Digital Art

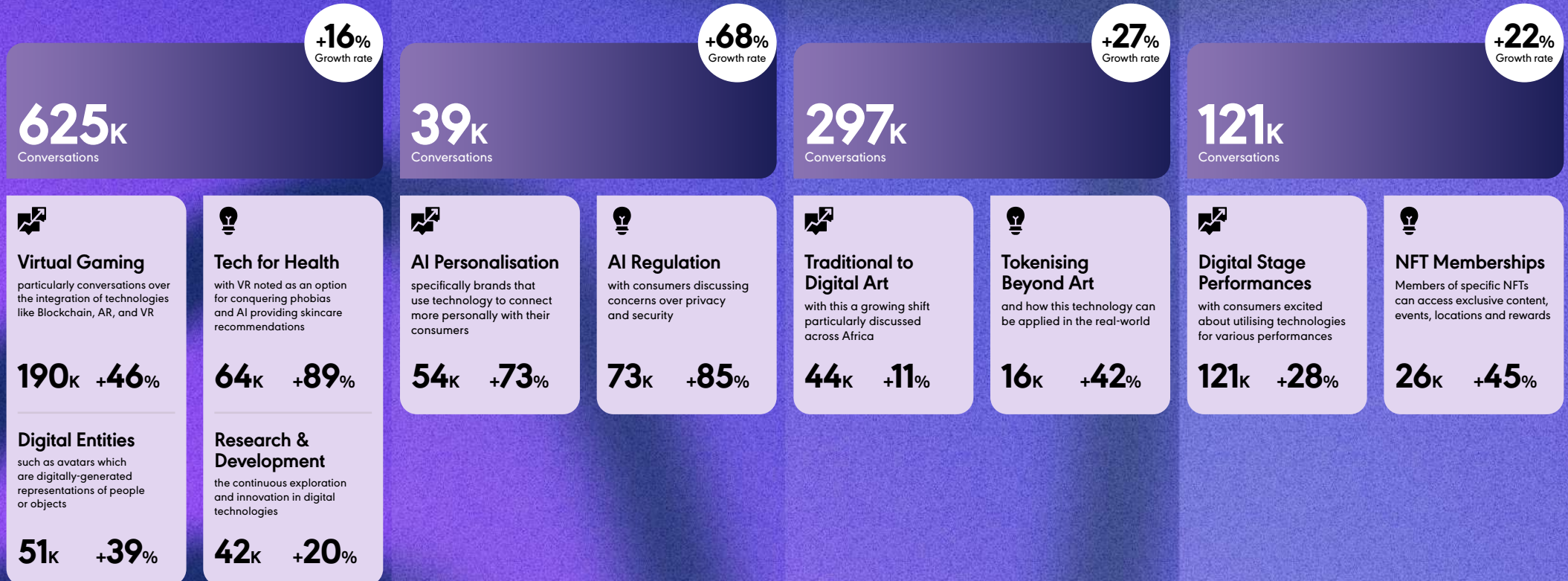
with consumers particularly interested in trading such art

High-tempo Digital Experiences



AR Events

with AR applauded for raising the bar of in-person and virtual gatherings



REGIONAL CONVERSATIONS

Within *Expanding Reality*, what are the trending topics of conversation around the world?

NORTH AMERICA

+95%
YOY Regional
Conversation
Growth Rate'

TRENDING TOPICS:

AI Productivity

+165%

AI is acknowledged as transforming a variety of industries, with AI chatbots highlighted to connect brands with customers and foster engagement

Tech for Health

+92%

Consumers note the traction of AI in healthcare technology, such as chatbots for scheduling appointments, personalised treatments, and even AI-robots for surgical procedures

EUROPE

+86%
YOY Regional
Conversation
Growth Rate'

TRENDING TOPICS:

Personalised
Recommendations

+148%

Consumers discuss VR and AR enabled try-ons in the fashion industry, as retailers seek to reduce "return item" volumes

Data Privacy

+129%

Large companies stressed the importance of data privacy and security in AI

ASIA PACIFIC

+79%
YOY Regional
Conversation
Growth Rate'

TRENDING TOPICS:

Data Privacy

+96%

There are concerns around digital security, or the lack of it

AI in
Ecommerce

+91%

Ecommerce trends including VR, AI chatbots, and personalisation of ads were prominent, including AI elevating shopping experiences through personalised suggestions and recommendations

LATIN AMERICA AND CARIBBEAN

+95%
YOY Regional
Conversation
Growth Rate'

TRENDING TOPICS:

Supporting
Emerging Artists

+109%

Artists actively engaged with platforms that are tailored to their local communities, sharing their digital artworks

AI Chat Bots

+108%

Debates circulated about AI's potential to diminish human creativity, specifically in artistic fields

Digital Art

+102%

#cryptoart was heavily discussed, specifically those that are created for the Hispanic community

AFRICA

+75%
YOY Regional
Conversation
Growth Rate'

TRENDING TOPICS:

AR Events

+112%

Productivity boosting AI tools, including virtual chat capabilities, automated meeting insights, and image editing tools were welcomed

AI Productivity

+105%

AI is playing a role in personalisation, for example helping consumers to analyse their clothing choices based on personal style and identity

Digital
Art Hype

+83%

The growing trend of artists increasingly transitioning from traditional to digital art was highlighted, along with the role this plays in supporting emerging African artists

BRAND SPOTLIGHTS

We've spotlighted several external brands, and one Diageo brand, that are helping consumers live out *new digital experiences*.



Amnesia - Decentraland

Amid the COVID-19 pandemic, the nightclub Amnesia Ibiza launched its first virtual club in the Decentraland Metaverse. Users could move through three iconic spaces (the terrace, the Amnesia arena, and the museum room), to listen to some of the world's biggest artists, watch live sessions from Ibiza, and enjoy content on the history of the island. The virtual amnesia store also included exclusive NFT merchandise and virtually and physically usable artists. Virtual Amnesia brought to life the true essence of a 3D club, combining iconic elements of the music and nightlife industry in a fun and technological environment.



NotCo

NotCo is a Chilean food-tech company that uses Artificial Intelligence to replicate plant-based alternatives to animal-based food products. The brand developed 'Giuseppe', an AI programme, to understand everything about the foods consumers love to eat and look for ways to recreate them, replacing all ingredients that use animal by-products for plant-based ones. By analysing the structure of animal-based food at its molecular level, Giuseppe's algorithm is helping to create a more-sustainable world by replacing animal products, while helping its food to taste even better.

Discover more:
www.notco.com



CULT&RAIN

CULT&RAIN is a tech-enabled designer streetwear brand from New York. Founded in 2022, its mission is to produce exclusive "PHYGITAL" fashion, digital wearables, & metaverse artifacts, with the creation of CULTR WORLD, its own Metaverse experience, highlighting its dedication to the Web3 atmosphere. In 2022, CULT&RAIN launched a sell-out collection of luxury sneakers and Varsity jackets produced from cutting-edge 3D animated NFTs and paired with luxury physical counterparts, before stepping up a notch this year with another collection of NFTs paired with physical luxury hoodies.

Discover more:
www.cultandrain.com/about



Johnnie Walker: Adapted Reality

For over two centuries *Johnnie Walker* has been committed to pushing the boundaries of what's possible in whisky, with its constant search for progress and innovation earning its position today as the biggest whisky brand in the world. However, whilst staying true to the brand's legacy, Johnnie Walker is committed to looking to the future and attracting the new generation of whisky drinkers.

To help build new connections with consumers, *Johnnie Walker* is adopting new technology. In 2022, the brand adopted Augmented Reality;

collaborating with American rock band Guns N' Roses to create an AR lightshow experience at a concert in Bogotá, Colombia. Activated from QR codes, fans used their cameras to view AR images of the band and the *Johnnie Walker* brand as they rocked out at the outdoor venue, an experience that combined both the physical and digital to create a truly memorable brand-led experience.

This is only the tip of the iceberg; from adding AR to its 'Games of Thrones' whisky offering in 2020, to entering the Web3 space with

a music event in the metaverse, the brand is committed to taking bold new steps into this expanding reality.

Johnnie Walker knows that attracting consumers who seek culturally relevant brands is essential to maintaining relevance, and its commitment to fulfilling this important new landscape of expanding reality will do just that.

To find out more about the 'Journey of Flavour' tour at Johnnie Walker Princes Street, visit: www.whatsyourwhisky.com/en-row/intro

Expanding Reality 2024

REDEFINING HOW WE EXPERIENCE THE WORLD

The *Expanding Reality* trend will continue to redefine how consumers experience the world, blurring the boundaries between the physical and the digital. 2024 will bring boundless opportunities to enhance and augment everyday life, embrace new realities and create new spaces for people to socialise and interact.

What consumers will be looking for in 2024:

Immersive Learning

Virtual social interactions will be taken to the next level. From students leveraging immersive learning experiences to VR and AR applications enabling hands-on learning of historical sites, societies search for knowledge and exploration will not be restricted to the physical world.

Digital Shopping Transformation

Consumers will be on the lookout for personalised, immersive, product showcases that mimic in-store shopping. E-commerce will need to undergo a virtual transformation to match consumer wishes for enhanced online shopping satisfaction.

Full Personalisation

Consumers will be looking for fully customisable options in their favourite brands and products, not only in how they shop for them but in the way they personalise them.

How brands can engage in 2024:

Enhanced Virtual Collaboration

The business landscape will see a shift towards immersive virtual collaboration to further enhance global interconnectivity, with brands needing to invest in technologies like AR and VR for remote meetings, training, and product development.

Embrace Web3

Brands must explore the potential of Web3 and decentralised platforms to engage with niche communities. Blockchain-based fan tokens, community-driven projects, and social tokens will gain traction in brand-customer relationships.

Metaverse Expansion

Brands need to increasingly venture into the metaverse and embrace advanced virtual spaces and experiences. We will likely see a growth in virtual storefronts, interactive events, and immersive product showcases.

We asked Diageo World Class GB Bartender of the Year 2023 and winner of the Don Julio Challenge at the 2023 World Class Global Finas Matt Arnold to bring this trend to life as a cocktail.

COCKTAIL

Metric Margarita

INSPIRED BY

Matt Arnold

World Class GB Bartender of the Year 2023

The Metric Margarita has been designed around reducing the carbon footprints of each ingredient whilst innovating those products alongside the use of AI.

RECIPE

- 60ml Don Julio blanco
- 18g metric margarita powder
- 50ml water

METHOD:

Build all ingredients in a tin or shaker
Stir to dissolve the powder
Pour over ice into a rocks glass

Drink responsibly. DRINKIQ.com



EFRAIN ROSARIO

Global Futures Shopping Planning Lead

COLLECTIVE BELONGING

Brands and products for an *Inclusive and Connected World*

At a time when it can feel like society has become less tolerant, there is a growing yearning for *Collective Belonging*. In response to provocative headlines and polemic debates, consumers are increasingly seeking real world and virtual spaces that embrace unity and acceptance and unite them with like-minded individuals.

Fuelled by technology, this has led to the proliferation of niche online and offline communities, where people can connect with those who share their passions and values. With a community out there for every interest, this is reshaping how consumers achieve a sense of belonging, as their passions become what connects them to people from different backgrounds and geographies.

48%

of 18-44-year-olds engage in digital communities, more so than they do in real life communities

(Source: [Mindshare](#))

53%

of consumers aged 27-58 assume a brand is doing nothing, or hiding something, if it does not communicate its actions to address societal issues

(Source: [Edelman](#))

+50%

of buyers in the US between 18 and 29 believe brands should take a public stance on current issues

(Source: [Hubspot](#))



TRACKING THE TREND

People are increasingly gravitating towards virtual and 'IRL' (in real life) spaces that provide a sense of inclusivity, where their interests and passions take centre stage.

WAYS IN VIA THE MICROTRENDS

Brands that need a way in to *Collective Belonging* can embrace the following microtrends to meet consumer demands and bring together people and passions.

Championing Inclusive Cultures

Consumers seek brands that empower everyone to express themselves authentically, ensuring that every voice is heard and valued. While equal access is important, the concept of equity takes centre stage, and with this being our fastest-growing trend it emphasises the crucial role of brands in supporting those who are underrepresented.

Connecting Passionate Fandoms

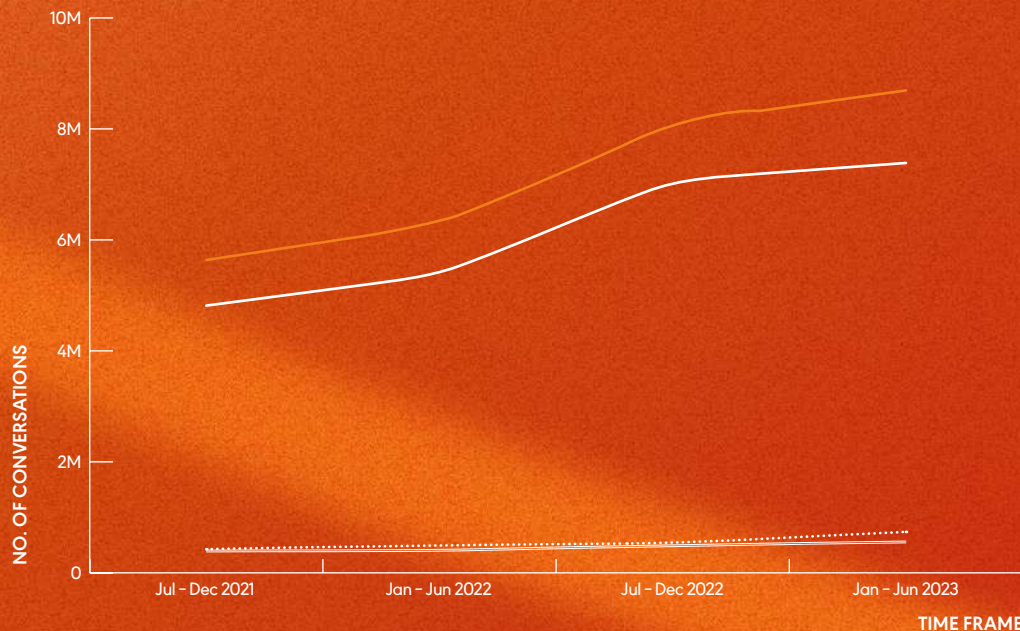
Beyond demographic markers, people crave meaningful connections with like-minded individuals who share their values, interests, and passions. Brands are taking the lead in supporting and nurturing these passionate fandoms, providing platforms for individuals to bond and forge genuine connections.

Brand-Built Communities

Fans invest emotionally in the brand itself, forming a strong sense of connection with others who share their obsession and affinity for the brand's offerings. By creating unique environments, products, and symbols, brands provide opportunities for individuals to proudly signal their "membership" in the brand-built community.

Tracking the conversation around *Collective Belonging*:

July 2021-June 2023



Conversations Growth rate YOY

Collective Belonging Total	28.7M	+41%
Championing Inclusive Cultures	24.6M	+42%
Brand-Built Communities	2.2M	+38%
Connecting Passionate Fandoms	1.8M	+32%

Championing Inclusive Cultures



Smirnoff's "We Do We" marketing campaign promoted a collective spirit that transcends cultural, social, and geographical boundaries, with the brand celebrating individual differences and the unity of people from all walks of life.

Connecting Passionate Fandoms



In 2023, Bailey's became the official partner of the Eurovision Song Contest, the annual event that brings fans together from across the world in a joyful celebration that champions inclusive and diverse cultures and communities.

BREAKING DOWN THE WAYS IN

Within each *Ways In*, what are the specific topics of conversation that consumers are talking about?

- MOST DISCUSSED CONVERSATIONS**
(Highest volume, with steady growth)
- GROWING CONVERSATIONS**
(High volume, with high growth rate)
- EMERGING CONVERSATIONS**
(Growing volume, with high growth rate)

Championing Inclusive Cultures



Diversity Initiatives

including brands hiring diversity experts

+25%
Growth rate

2.4M
Conversations



Disability Inclusiveness

with consumers raising awareness of popular stereotypes

+22%
Growth rate

2.2M
Conversations



Niche Subcultures

with consumers discussing the influence of these on mainstream culture

+44%
Growth rate

287K
Conversations



Online Communities

after Covid fuelled a growing wish for consumers to connect online

+49%
Growth rate

207K
Conversations



Brand-Built Communities

Influencer Sponsorship

where businesses partner with social media influencers with a large following

+67%
Growth rate

372K
Conversations



Pop Culture

as famous brands and celebrities celebrate diversity

1.1M **+38%**



Support Systems

particularly organisations that launched support systems to assist employees

1.9M **+32%**



Sports & Gaming

with this seen as a crucial way of connecting society

263K **+20%**



Celebrity Fandoms

with brands using popular celebrities to gain share amongst their followers

52K **+41%**



Hyperlocal Collaboration & Partnership

focused on brands collaborating with local influencers

38K **+37%**



Community-Centric Projects

with small businesses and brands to drive innovation and engagement

33K **+80%**

Food & Beverages

as brands bring people together using shared tastes and culinary experiences

227K **+36%**

Limited Editions Offerings

this is seen as a popular way for brands to interact with their fans

22K **+26%**

REGIONAL CONVERSATIONS

Within *Collective Belonging*, what are the trending topics of conversation around the world?

NORTH AMERICA **+42%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Disability Pride Month

+81%

Individuals and brands stood up for specific communities, celebrating Disability Pride Month and supporting individuals facing racism amongst others

Web3 Brand Communities

+71%

Users were looking to join like-minded communities on social platforms, including rise of Web3 community-owned brands

EUROPE **+26%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

EA & FIFA

+121%

The fusion of sports, gaming, and culture provided a platform for fans from different backgrounds to connect, compete, and share their love for football

Diversity Initiatives

+78%

The rights of neurodivergent children was discussed, with stereotypes associated with diseases such as ADHD and Autism highly discussed

Celebrity Partnerships

+63%

Fans were excited about famous brand ambassador appointments, particularly with celebrities that aligned with consumer values

LATIN AMERICA & CARIBBEAN **+67%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Fight against Gender Violence

+170%

Feminism and the fight against gender violence dominated consumer conversations, driven by various protests and rallies

Celebrity Collaboration

+91%

Consumers appreciated how the collaboration between celebrities and brands brings communities together

Art & Music Subcultures

+74%

Conversations surrounding films and music, and how these shape lives and identities

AFRICA **+38%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Brand Community

+75%

Well-known brands lead projects for community upliftment across the continent

Dance Subculture

+59%

A growing number of 'subcultures' was noted, such as the Jamaican Dancehall subcultures and the 50-year-old Hip Hop culture

Celebrity Endorsements

+55%

Celebrities were utilised by brands for endorsements and wider reach, increasing fanfare

ASIA PACIFIC **+39%**
YOY Regional Conversation Growth Rate'

TRENDING TOPICS:

Indian Premier League

+105%

Consumers credited the Indian Premier League for creating fan zones to cater viewers in remote areas of the country, as well as the League's encouragement of female fans following the league

Content Communities

+91%

Fan clubs of Korean and Indian content creators celebrated their association with various brands

Women in Sport

+58%

LGBTQIA+ inclusion in the workplace, specifically during Pride Month, was a popular conversation

BRAND SPOTLIGHTS

We've spotlighted several external brands, and one Diageo brand, that are helping consumers unite and feel a *sense of belonging*.



Virgin Atlantic "See the world differently"

Virgin Atlantic has always championed individuality and its 2022 campaign "See the World Differently" celebrated the uniqueness of its people and customers. The advert follows a group of individuals on their travels with Virgin Atlantic, on the ground and in the air. This was reinforced by a print campaign made up of shots of Virgin Atlantic crew and customers, with lines championing their individuality, including a female Captain with the line 'Born to fly' and a businesswoman saying, 'I am my own captain'. The campaign is a colourful celebration of the diversity of the world around us, and sends a message that everyone is welcome onboard with Virgin Atlantic.

Watch the campaign here: www.youtube.com/watch?v=aleOmsEG0Ik



Bumble

Bumble, the dating and social networking app, was founded by CEO Whitney Wolfe Herd in 2014 to empower people to make meaningful connections across dating, friendship, and professional networking. Bumble is women-first, built on the belief that when dating is better for women, it's better for everyone. The popular dating app is focused on empowering equitable connections, no matter the type of relationship, and built around kindness, respect and equality.

Discover more: www.bumble.com



South Korea's 'Grey-Pop'

We've all heard of 'K-Pop', but 'Grey-Pop' is the new buzzword in South Korea as elderly influencers gain legions of fans worldwide. 'The Ahjussis' for example are all over the age of 60 but have defied their age to emerge as one of South Korea's latest supergroups. This phenomenon however is not only connecting passionate fandoms across the world, but importantly is also helping to tackle one of the country's growing issues - its aging population. Over 65s account for 20% of the country's population with the suicide rate of people over 66 being one of the world's highest, with 'Grey-Pop' helping to tackle pre-existing views on aging.



Guinness: Black Shines Brightest

Despite its association with Ireland, *Guinness* has become deeply rooted in modern African culture. With a rich history and huge popularity across the continent, *Guinness* is dedicated to bringing this heritage to life.

This was exemplified in the brand's 2021 'Black Shines Brightest' campaign, a Pan-African campaign that celebrated how *Guinness* has been enjoyed across Africa for over a century. The campaign brought together passionate and creative individuals, celebrating African creativity and ingenuity and featuring some of the best-known local culture makers.

People of African heritage come together around the world and celebrate with *Guinness*, with 'Black Shines Brightest' highlighting this commitment. In London, for example, Guinness championed the local community at Notting Hill Carnival 2023, the annual celebration of Afro-Caribbean culture, with its grassroots programme 'Original Sounds Collective' encouraging women from diverse backgrounds to get into Carnival culture.

Building communities is engrained in *Guinness*; 'communion' is ultimately one of its three core values. Fans around the world

connect through iconic merchandise, collaborations with famous music artists, partnerships in sport such as Six Nations Rugby, even dedicated Instagram pages that review the quality of poured pints. And with *Guinness*' global popularity continuing to grow, not just in Africa, this community is only getting bigger.

To read more about Diageo and how it creates belonging across cultures today, visit:

www.diageo.com/en/our-brands/brand-explorer/guinness

Collective Belonging 2024

CONNECTING IN A FRAGMENTED WORLD

Collective Belonging will continue to shape how consumers find connections and a sense of belonging in a more fragmented world. As consumers increasingly value individuality, niche community engagement, and the integration of digital and real-world connections, this trend will evolve to emphasise inclusivity, community-driven initiatives, and authenticity.



MITALI MENDA

Global Futures Category & Portfolio Planning Lead

What consumers will be looking for in 2024:

Genuine Connections

Consumers will continue to look for authenticity and individuality, steering towards brands and micro-communities that resonate with their personal values and interests, and offer havens of belonging and shared identity.

Finding their Tribes

In today's interconnected world, niche communities and individuals with particular interests are thriving, finding unique connection spaces and opportunities. These consumers are discovering like-minded individuals globally through authentic and personalised experiences, with consumers set to continue to share, explore, and celebrate their specific interests.

Advocating for Inclusive Narratives

Consumers will continue to be vocal advocates for inclusivity and diversity and will gravitate towards brands that champion similar causes. The connection between consumers and brands extends beyond products, reflecting a shared commitment to meaningful change.

How brands can engage in 2024:

Champion Social Causes

By authentically engaging with social issues, brands can actively give consumers a voice for progress and justice. Brands can take concrete actions by not only expressing support for political and social causes such as gender, ethnicity, and growing conversations around neurodiversity, but also by implementing tangible programs that protect and amplify these authentic issues.

Empower Authenticity, Celebrate Diversity

Brands must implement comprehensive campaigns that celebrate diversity, going beyond just acknowledging its existence. They must also provide platforms for marginalised voices and invest in initiatives that support underrepresented communities, ensuring that the commitment to empowering authenticity is woven into the fabric of their corporate culture.

Nurture the Niche Communities

Rescuing and empowering smaller groups in society requires brands to move beyond surface-level support and authentically connect and empower these unique communities in meaningful ways. Collaborating with niche communities involves co-creating products and experiences that genuinely reflect their passions and values.

We asked Global Tanqueray Ambassador, Jenna Ba, to bring this trend to life as a cocktail.

COCKTAIL

No. TEN Martini

INSPIRED BY

Jenna Ba

Tanqueray Global Brand Ambassador

The martini is having a moment. However you enjoy yours, this elegant drink transcends time and there is one for every consumer, tapping into that 'collective belonging' psyche.

RECIPE

- 40ml Tanqueray No.TEN
- 30ml dry vermouth
- 1 dash orange bitters
- 1 dash grapefruit bitters

METHOD:

Mix Tanqueray No. TEN gin and vermouth with ice and stir for 10 second
Add orange and grapefruit bitters
Strain into a chilled cocktail glass
Garnish with the zest of grapefruit or a red olive

Drink responsibly. DRINKIQ.com

NAVIGATE TRENDS, SHAPE TOMORROW



Mark Sandys, Diageo's Chief Innovation Officer, provides his concluding foresight:

In today's rapidly evolving world, adaptability and innovation are paramount. The trends showcased in this report underline the need for brands to embrace change, reimagine strategies, and stay agile in responding to evolving consumer needs. Some of my key takeaways are:

Holistic Sustainability

Consumers are seeking brands that align with their values, with many seeing planet-positivity as a mindset rather than an add-on. Consumers are also on the lookout for guilt-free products and services that integrate luxury and wellbeing, whilst fostering deeper connections with diverse communities. The brands that truly succeed will treat sustainability as holistically and transparently as possible.

Phygital Ubiquity

New technologies are reshaping physical experiences altogether, leveraging the advantages of both the physical and digital worlds. With this 'phygital' world now the norm, brands must integrate this expanding reality across all points of their consumer journey, as society increasingly looks for easy-to-adopt solutions in their everyday life.

Balancing Indulgence and Wellbeing

The pursuit of wellbeing is undergoing a transformative renaissance, colliding with the traditional notions of hedonism. Consumers are searching for balance and harmony, seeking products that not only provide indulgence but also contribute positively to their overall health and happiness. The era of guilt-laden indulgence is fading, and must switch to ideas of hedonism to mindfulness and social health.

CommUnity

Communities are no longer confined to geographical boundaries, sharing interests and passions with likeminded people across the globe. Brands must utilise the power of uniting diverse groups, whether this is around a social cause or a niche interest, successfully fostering a sense of belonging on a deeper, more personal level.

EMBRACING CHANGE IN 2024

To navigate the ever-evolving landscape of consumer trends, the power of external awareness and data-driven insights cannot be overstated. Brands at the forefront of change are those that embrace a keen understanding of their consumers and their constantly changing environments.

In an era where information is key, having the right capabilities to interpret and leverage data is the driving force behind shaping the future of consumer trends and industry dynamics. Brands that will win in 2024 will adopt the following principles:

Encourage Dialogue and Co-Create

Make consumers a part of the process. To stay ahead brands must tailor their marketing, innovation, and even business solutions side by side with their consumers. A consumer-centric approach, understanding their evolving needs and aspirations, is central to thriving in this dynamic landscape.

Collaborate and Partner

Brands must build on their existing relationships, collaborate with external partners and share resources and knowledge if they want to build their brands of tomorrow. Building strategic alliances with like-minded brands, influencers, and niche communities is key to success, and is essential for enhancing brand credibility and fostering a sense of belonging.

Be Creative, with Precision

In all trends, data is a vital resource. Brands should harness data to understand consumer behaviours, preferences, and emerging trends. Insights from data will guide future strategies

Be Externally Aware and Constantly Listen

This is one reason why we have produced this report – to listen to other industries and therefore stay ahead. Brands that want to win in 2024 must embark on a journey of continuous learning and adaptation, so as trends evolve, they can stay informed, experiment with new approaches, and ultimately stay attuned to their most important stakeholder – the consumer.

The future holds exciting possibilities for brands and organisations that are willing to embrace these trends with an open mind and a commitment to positive change.

By staying informed, adapting, and putting the consumer at the centre of their strategies, brands can navigate the ever-changing landscape and thrive in 2024.

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