

FORESIGHT REPORT
JANUARY 2025

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Navigating the
cultural trends
shaping tomorrow

DIAGEO

INTRODUCING DISTILLED



Cristina Diezhandino
Chief Marketing Officer,
Diageo



FORESIGHT FOR 2025

Welcome to Distilled 2025, Diageo's second Annual Foresight Report, which sets out the most pressing consumer trends facing brands today.

Distilled was created to uncover and analyse key trends shaping the future of socialising. Its ethos is rooted in a desire to drive a deep understanding of our consumers in all our markets.

Through our Diageo Foresight SystemTM (1) we identified a wide-ranging representation of global consumer trends, with five key macro-trends that we saw shaping global consumer behaviour: Neo-Hedonism, Conscious Wellbeing, Expanding Reality, Collective Belonging and Betterment Brands. Each of these macro-trends has a series of "signals" or micro-trends that feed into it.

For Distilled 2025 our aim has been to dig deeper and gain richer foresights. In the last

12 months, we have analysed over 160 million social media and online conversations across all our markets, enabling us to look more deeply at the macro-trends. Significant themes have emerged.

The micro-trend we call "AI-Enabled Relationships" has boomed across all regions, with conversations operating at all levels. At Diageo we have asked how AI can enhance the consumer experience with our brands. In May we further evolved the use of our proprietary FlavorPrint technology through the unveiling of "What's Your Cocktail?", which uses AI to provide consumers with real-time beverage recommendations that match their unique flavour preferences.

Conscious Wellbeing and wellness were a key combination last year and this has continued, with consumers demanding more moderation options across social occasions.

Micro-trends like "Decelerated Occasions" are signalling a consumer desire to slow down some social occasions – and there is also growth in conversations around "Substituted and Expanded Products". Both of these micro-trends provide insights about consumers wanting to moderate more with 0.0% products as well as novel behaviours like "zebra striping", where consumers alternate between alcoholic and non-alcoholic beverages⁽²⁾. Other areas of growth include "Connecting Passionate Fandoms" and "Brand Built Communities", which are part of Collective Belonging. These new areas speak to the importance of placing brands in relevant and popular cultural settings. Over the last year, Diageo's brands have shown up at key global cultural moments. One of my favourites took place in March 2024, when Don Julio Tequila took centre stage at the Oscars, becoming the first spirits brand to ever be integrated into the Oscars live broadcast.

I hope Distilled 2025 will serve as inspiration for new thinking this year. 2025 will, no doubt, be marked by change and challenge – but also by opportunity. I am sure we will continue to see the value and importance of connections and socialising as we look to drive positive outcomes for all.

(1) A proprietary insights tool – part of our Consumer Choice Framework – that helps deepen Diageo's understanding of consumer motivations and occasions and shape the future of socialising.

(2) KAM reported in June that 1 in 4 British consumers were practising "zebra striping" in the on-trade. Source: [KAM](#)

THE TRENDS



01.

NEO-HEDONISM

Consumers are re-evaluating how they spend their money, searching for innovative ways to experience pleasure in their everyday lives.



02.

CONSCIOUS WELLBEING

There has been an evolution in how consumers define health and happiness, with consumers having a more holistic view of wellbeing.



04.

COLLECTIVE BELONGING

Consumers are increasingly seeking physical and virtual spaces that embrace unity, acceptance, and allow them to engage with like-minded individuals.



03.

EXPANDING REALITY

Technologies like AI, Virtual Reality (VR), and Augmented Reality (AR) are revolutionising how consumers perceive and interact with reality.



05.

BETTERMENT BRANDS

Consumer conversations show them to be increasingly eco-conscious, becoming more aware of the environmental and social impact of their choices.

THE KEY TRENDS OF 2025

Within each of the five macro-trends, we have identified the new behaviours and concepts that are showing signs of developing into important trends in 2025.



NEO-HEDONISM: ONE NIGHT ONLY

2025 will see a desire to spend more time and money on singular, unique products and experiences – in many cases to create once in a lifetime memories. It's about having that amazing night out. The data clearly shows that all trends around Neo-Hedonism are growing but the themes are far less about usual indulgence. The sub-trend of 'Indulgence for all' shows only 22% year on year growth – while the aforementioned "Unique Products and Experiences" micro-trend increased 83% year on year. And 42% of consumers are interested in visiting or talking about "Alternative Social Spaces" – in other words changing how we socialise week to week.



CONSCIOUS WELLBEING: MODERATION AND "ZEBRA STRIPING"

Within Conscious Wellbeing the performance of two micro-trends strongly points towards the continued importance of moderation and the evolution of drinking trends.

While the growth of the micro-trend "Celebrating Self-Love", (37% year on year), which refers to consumer focus on self-care and wellness, suggests a continued consumer desire to moderate, more interesting is the 79% growth in conversations around "Decelerated Occasions". This strongly implies that consumers are wanting to be part of events and occasions that are not high intensity. And it is in this environment we hear more and more about the practice of "zebra-striping" both at home and in the on-premise. The act, which is simply alternating between alcoholic and non-alcoholic drinks, is, according to KAM Media, being practiced by nearly a quarter of UK drinkers in the on-premise already.



EXPANDING REALITY: NORMALISATION OF AI

AI is popping up across millions of global conversations. The "Digitising the Physical World" micro-trend includes the increasing ways AI is present in day-to-day life – from banking to fitness apps.

However, it has shown up most significantly in "AI-Enabled Relationships". This micro-trend is a big step up from enabling more efficient banking! It is showing high levels of year-on-year growth across every region – from 96% in Europe, 69% in Africa and 85% in Asia-Pacific, to 75% in Latin America & Caribbean (LAC) and 91% in North America. It shows how consumers are engaging with advanced AI companions that can maintain long-term relationships with humans, moderate their emotions, and induce purchase.



COLLECTIVE BELONGING: THE POWER OF FANDOMS

Fandoms are not new – but such is the volume of global conversations in this area, they are the "flavour" of the last year; and their importance and growth shows no sign of slowing down. Over 32m conversations were part of the "Connecting Passionate Fandoms" micro-trend – more than double last year's figure (an increase of 121%); and markets like LAC and North America have seen increases of 135% and 126% respectively. More and more people are coming together on social platforms to talk about the things they really care about. For example, the Discord social media platform used to just be for gamers, now it hosts groups or fandoms for almost anything you can think of.

BETTERMENT BRANDS: LOCAL LOVE

Analysis of conversations over the last year showcases that there is a growing sense of local pride in many regions around the world. This pride in their local "heroes", gives companies that own brands with strong local portfolios a big opportunity to win with consumers. The consumer love for "Local Wealth" is a newer trend emerging from the wider conversation on sustainability. There has been a 59% year-on-year growth in these conversations with it being particularly pronounced in regions like Africa (85%). In Europe, it is manifesting itself via consumers increasingly buying goods second hand, indulging in thrift store challenges or using websites like Vinted.com.

THE METHODOLOGY

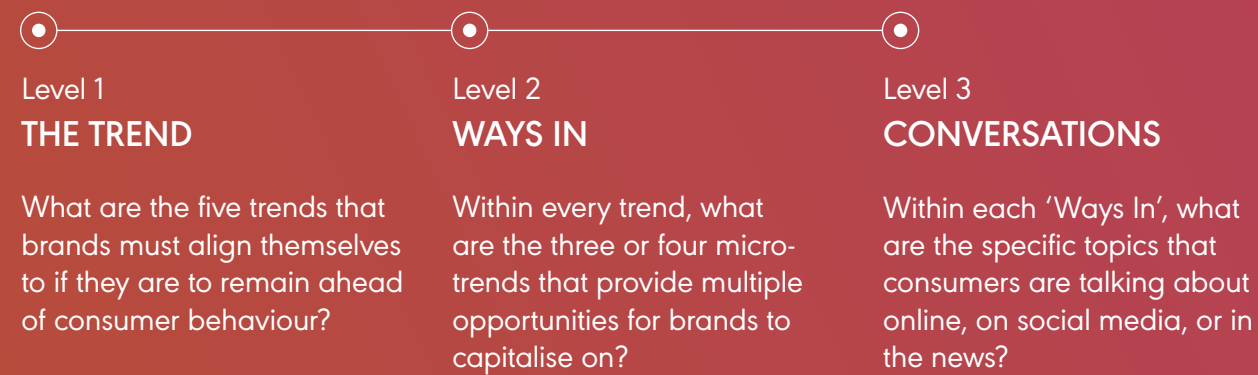


THE DIAGEO FORESIGHT SYSTEM AND THE LISTENING FRAMEWORK

The Foresight System is an advanced tool developed by Diageo in partnership with our data and insight partners at Share Creative. Over the last year it has monitored and tracked over 160 million conversations from a broad array of online sources, including social media platforms, forums and digital media in 180 markets across the globe, to uncover how consumer trends are shaping and evolving worldwide.

Powered by AI and supervised machine learning, the Listening Framework within the Foresight System has been updated to capture a wider scope of conversations around the core themes of this report. Evaluated by a team, this Human + AI approach has led to a more nuanced understanding of emerging cultural signals and expressions.

HOW THE TRENDS ARE BROKEN DOWN:

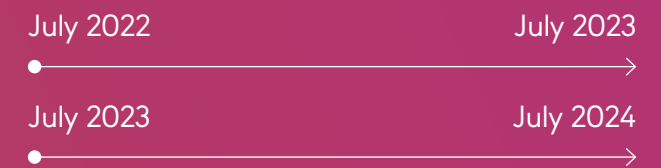


TIME FRAME

The data presented in this report from Diageo's Foresight System is measured between:

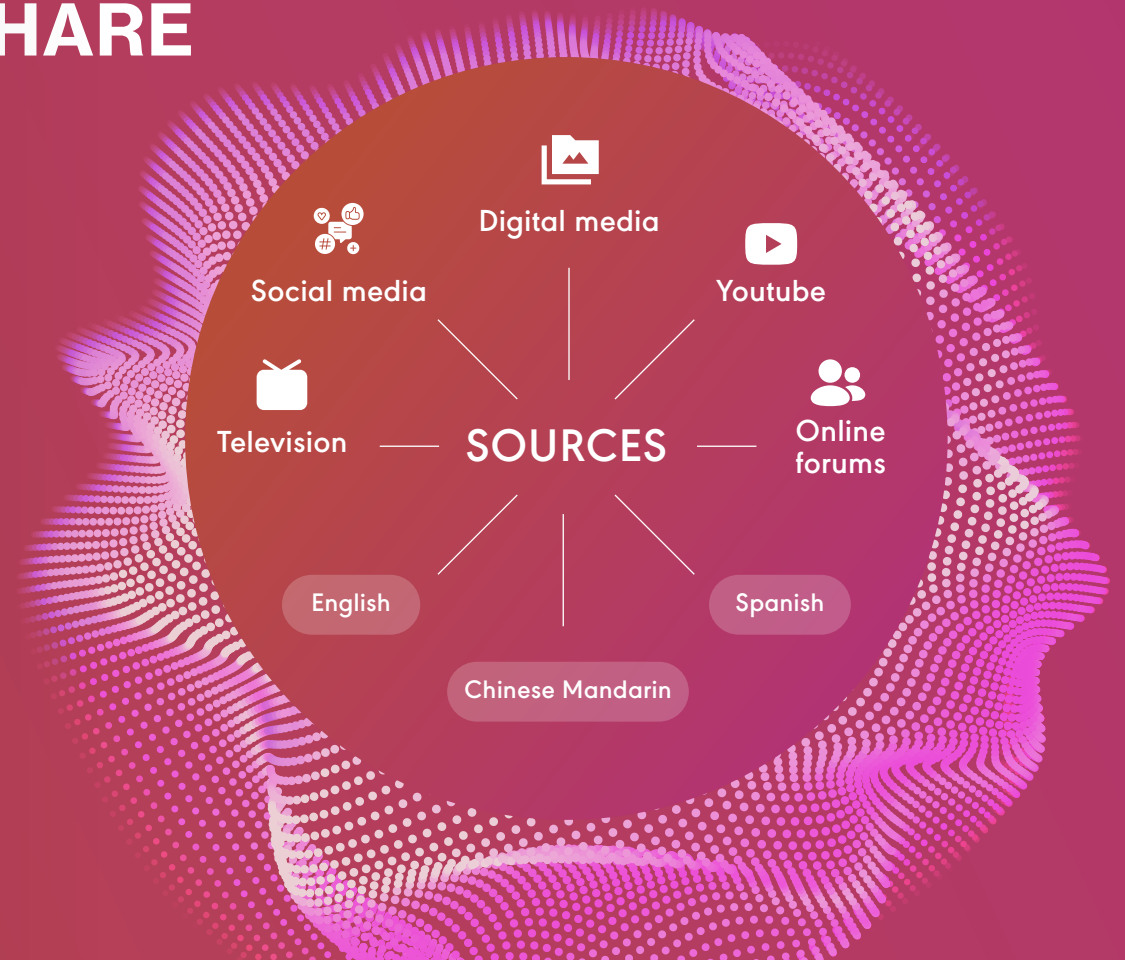


% Growth Rates throughout the report reflect the % increase in number of conversations between these two date ranges:



Distilled 2025 data and insight partner:

SHARE



TREND 01:
BRANDS AND PRODUCTS
FOR A MEANINGFUL LIFE

NEO- HEDONISM



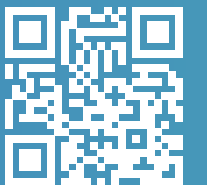
TREND OVERVIEW

Welcome to pleasure-seeking 2.0 – living your best life collecting experiences that make the soul sing. For gamers it is VR headsets that open their eyes and mind. For foodies, food isn't just fuel, it's a full-on adventure, with people chasing street food treasures. Real excitement is now found by stumbling upon a hidden waterfall during a hike or finding underground music festivals. The common theme is creating "pinch me" memories.



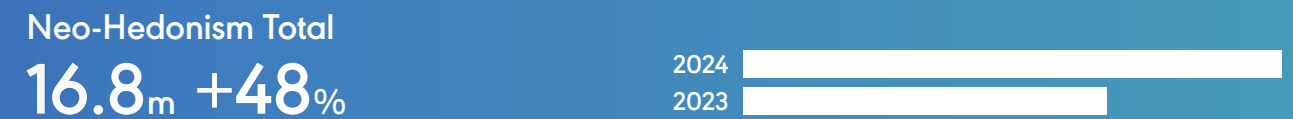
Feria Don Julio celebrates "El Grito"

Don Julio this year reimagined the traditional Mexican Fair through its own eyes – making "Feria Don Julio". Throughout Mexico's "El Grito" (Independence) weekend, Tequila Don Julio also showed up with incredible drinks experiences in the on-trade, inspiring cocktails, digital content and a creative stunt with Mexican actress Yalitza Aparicio.



SEE FULL
CASE
STUDY

TRACKING THE TREND 2024



Source: [Marriott](#)



Source: [NielsenIQ](#)



Source: [Statista](#)

THE CULTURAL CONVERSATIONS

Neo-Hedonism has shown rapid growth over the last 12 months. Consumers across all regions are delighting in new, exciting experiences, from using the most up to date gaming technology to exploring the great outdoors. However, most conversations also show that while we want these experiences, we do now live in an environment where consumers are choiceful with what they spend. Therefore, we are looking for experiences that are truly memorable.



01.

Euphoric escapes

Consumers are looking for experiences and products that create lasting memories and moments of escape. Travellers want to explore vibrant cities and relax at luxury locations, while seasonal events can guide people's tastes on evenings of exploration.



02.

The great outdoors

People are energised by adventure, exploring new destinations and eating local cuisine. And outdoor exploring can range from winter skiing, rock climbing and summer hiking to camping in the back garden!



03.

Immersive entertainment

Fans rave about gaming and VR; advancements in 3D rendering and spatial audio make virtual spaces more lifelike. In parallel, real world interactive experiences are transporting people to new environments.



04.

Meaningful connections

People are seeing a sense of community around shared passions, from music and books to sports and hobbies. They want to build deeper connections, where networking and learning opportunities create lasting bonds.



05.

Flavour fusion journeys

Diners are looking for culinary experiences that engage all senses with rich flavours, diverse textures, and enhanced ambience. There's also curiosity how sensory experiences can be altered by adaptogens and nootropics (two ingredient groups that allow brands to make brain health or mood support claims) – a market segment predicted to be worth nearly \$4 billion.*

* <https://www.businesswire.com/news/home/20210104005552/en/Global-Adaptogens-Market-Report-2020-2025-Surge-in-the-Innovation-Transparency-and-Brand-Building---ResearchAndMarkets.com>



WHAT CONSUMERS WILL BE LOOKING FOR IN 2025

We want more

Consumers won't just be chasing new experiences; they want to make more of what they already love. So, transforming a simple dinner into a gourmet experience, right at home - for example, people are starting to hire Michelin-starred chefs. Tailored recommendations or unique experiences will be the ones winning hearts in the marketplace.

Make it for me

Euphoria-seekers will take the reins and start crafting their own pleasure-filled experiences, replicating the fun they find when away from home. As Lucky Voice did with karaoke, can another company entice consumers to bring an on-premise experience into their home – or we will see companies help us to organise flash mob performances? Consumers will be looking for tools or ideas to help personalise these moments.

Help me choose

As consumers embrace the idea of exploring abundance, they'll crave experiences that make decision-making easier. For example, as travel and multi-sensory experiences become more accessible, people will want help navigating all the amazing options out there. They want to discover new pleasures without getting lost in a sea of choices.

HOW BRANDS WILL ENGAGE IN 2025

Curation inspiration

In 2025, brands should focus on enhancing consumers' everyday experiences. This can be achieved by offering products or services that elevate familiar activities. Private dining companies are helping people curate an evening in – could drinks companies arrange tastings and educational evenings?

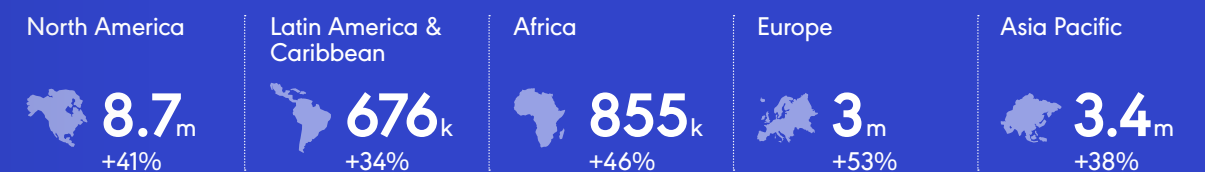
Make it for them

Brands should leverage technology to create personalised journey maps for consumers. These maps could highlight tailored recommendations based on individual preferences, past purchases, and trending experiences within their social circles.

Share it with friends

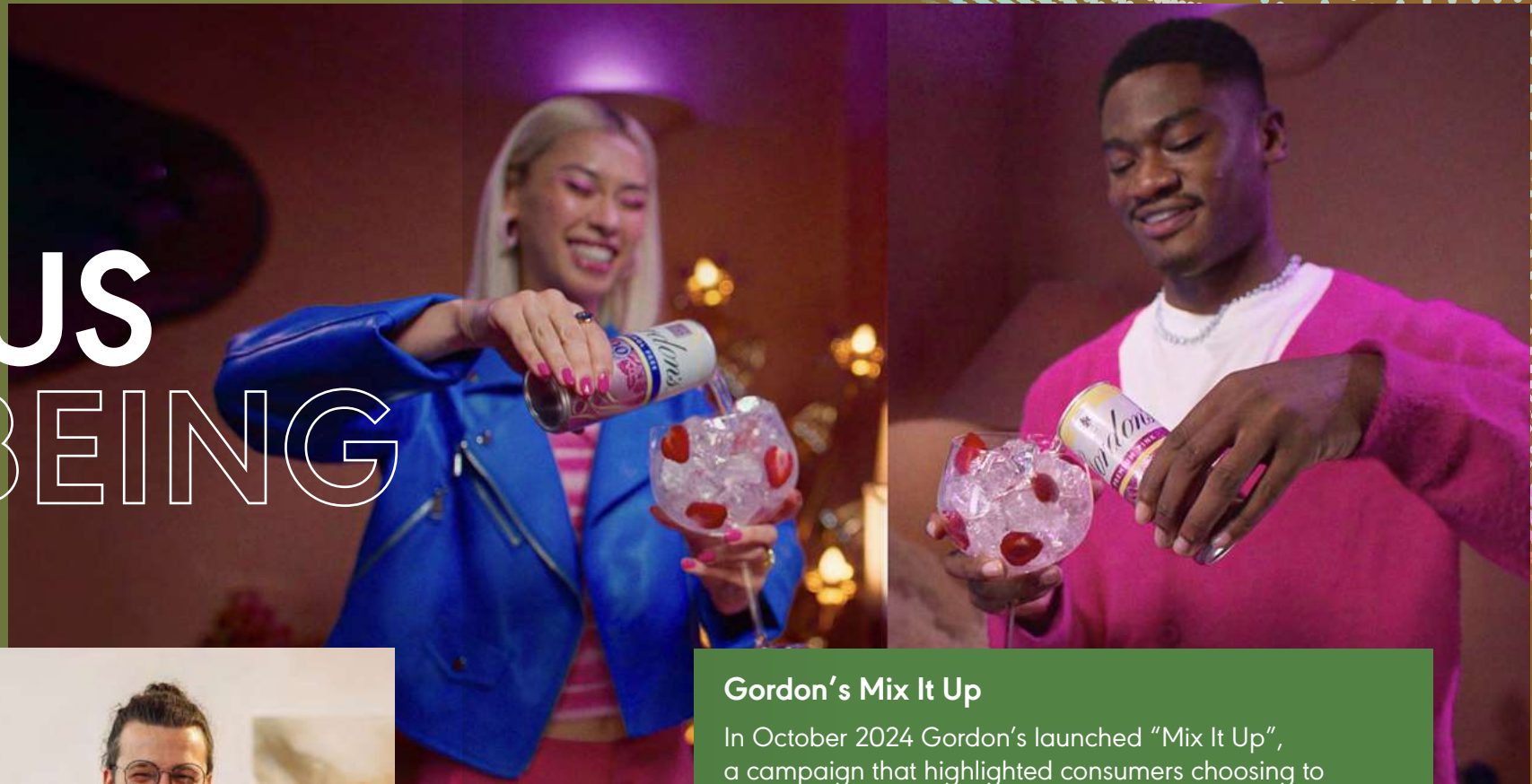
Brands should consider launching interactive platforms that allow users to share their own experiences. This could involve creating a mobile app where users can document their rituals and share tips. By fostering a sense of ownership and creativity, brands can deepen connections with consumers who are eager to personalise their indulgent moments.

NEO-HEDONISM GLOBAL STATS



TREND 02:
BRANDS AND PRODUCTS
FOR A BALANCED LIFE

CONSCIOUS WELLBEING



TREND OVERVIEW

Wellness is now about more than healthy eating and exercise. Feeling good means taking care of the whole package: from mind and body to people’s love/hate relationship with technology. Whether it’s setting healthy boundaries, exploring mindful eating, or creating sanctuaries at home where we can decompress, people are serious about what makes them feel genuinely good – and doing so in a truly personal way.



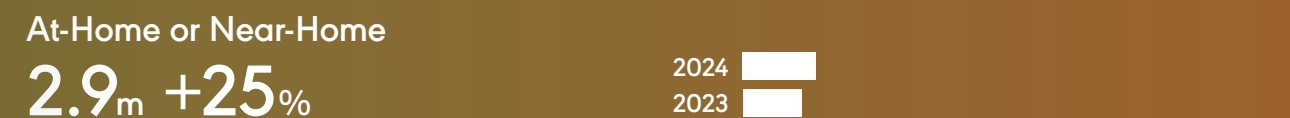
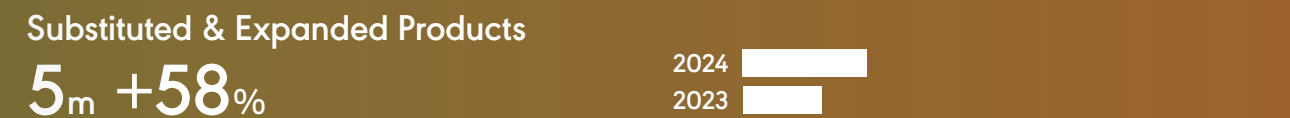
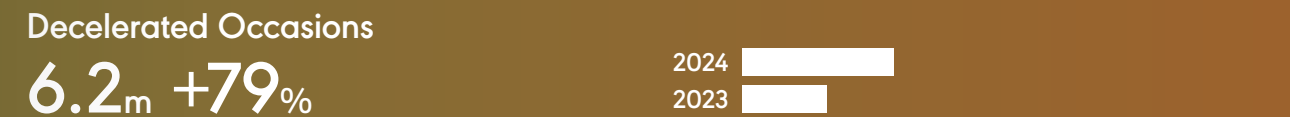
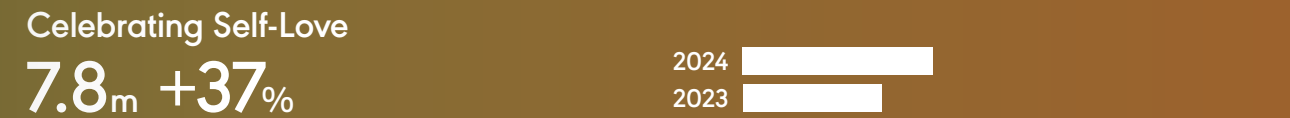
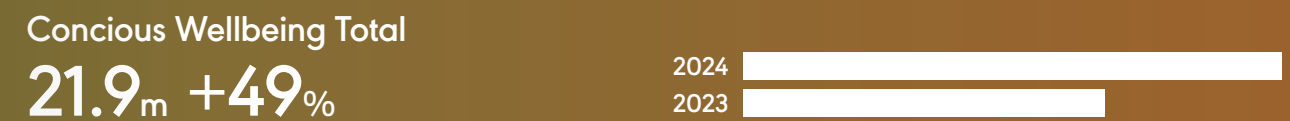
Gordon’s Mix It Up

In October 2024 Gordon’s launched “Mix It Up”, a campaign that highlighted consumers choosing to pace their consumption by switching between Gordon’s Pink and Gordon’s Pink 0.0%. The campaign showcased how moderation can involve celebrating with both an alcoholic drink and an alcohol-free product.



SEE FULL
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TRACKING THE TREND 2024



\$9tn

The projected size of the global wellness industry is US\$9tn by 2028

Source: Global Wellness Institute

78%

78% of Gen Z combine alcoholic and non-alcoholic drinks on nights out, compared with two-thirds of other adults

Source: KAM

180k

ChatGPT’s daily power usage is nearly equal to 180,000 U.S. households

Source: Forbes

THE CULTURAL CONVERSATIONS

The evolution within Conscious Wellbeing in the last 12 months has been fascinating, with consumers developing an even greater sense of “self” and a focus on their health and self-worth. This is more than better exercise and diet – consumers are now diving deeper into the concepts of gut health as well as digital detoxes.



01.

Mind matters

People are more empowered to prioritise their mental health, with individuals sharing stress management and relaxation tips. There’s a focus on therapy, religion, meditation.



02.

The mindful market

There are increased mentions and conversations about wellness products and services positioned as the vehicles for improved well-being, ranging from beauty treatments to tools like white noise machines and art classes.



03.

Cultivating self-worth

There is a focus on self-empowerment, with discussions on setting healthy boundaries and pursuing self-improvement without external validation. Topics include fostering positive body image, personal growth and maintaining healthy relationships.



04.

Nourished body boost

Conversations on physical health improvements also focus on mindful eating and wellness therapies. Special emphasis is placed on plant-based diets and exploring healthier alternatives.



05.

Digital – physical balance

People are exploring the mental health implications of working from home – the balance of working in a familiar environment versus longer periods being alone indoors. Part of this has seen a growth in the digital detox trend – people deactivating some social media to reconnect with “real life”.



WHAT CONSUMERS WILL BE LOOKING FOR IN 2025

Offering it all

Consumers want products that support both their physical fitness and mental well-being. Increasingly consumers are on the lookout for comprehensive wellness solutions – a ‘Wellbeing One Stop Shop’ that will address everything from nutrition to emotional resilience.

Wellness is still growing

Wellness is not a new concept – but the pace of innovation shows no sign of abating with the value of the global wellness industry now hitting the trillions of dollars*. Consumers in 2025 will still be looking for ways to boost their well-being through innovative workouts, like RowFormer and Wall Pilates that make staying healthy fun and engaging.

Digital dichotomy

Consumers are interested in finding ways to disconnect from their screens (some of website AlsoAsked Data’s more popular questions in the last 18 months have been “How do I deactivate Facebook?” and “How can I use my phone as little as possible?”)** – but they don’t want to miss out on innovations in new tech. Solutions for this desired digital detox while keeping things enjoyable could catch consumer attention.

HOW BRANDS WILL ENGAGE IN 2025

Holistic health

To engage effectively in 2025, brands interested in this space should embrace the idea of wellness as a holistic lifestyle. This means offering a wide range of products that support both physical and mental health, from nutritious snacks and supplements to innovative all-in-one fitness apps.

Game on

Brands could introduce wellness challenges that encourage consumers to try new activities or products over a set period – complete with rewards for participation. This gamification of wellness not only motivates individuals but also builds community among participants.

Digital mindfulness

Brands need to challenge themselves: consumers still want to engage via social media, uncover new tech but are mindful of screen and media overload. Look and learn from apps like Flipd, which combines the awareness of screen time reminders, the boost of productivity trackers, and the encouragement of mindfulness apps into one.

* Kantar Global Monitor, 2023

** <https://rehabasuk.com/blog/smartphone-addiction-the-importance-of-digital-detox-and-the-rise-of-dumb-tech>

CONSCIOUS WELLBEING GLOBAL STATS

North America	Latin America & Caribbean	Africa	Europe	Asia Pacific
8.8m +32%	842k +37%	1.9m +27%	3.7m +36%	6.4m +62%

TREND 03:
BRANDS AND PRODUCTS
FOR A DIGITAL WORLD

EXPANDING REALITY



TREND OVERVIEW

The line between digital and physical keeps blurring. AI is now at our service in every region of the world – from creating mind-bending artwork, to offering customer service at 3am. Virtual spaces are becoming our new “hangouts”, where we can learn, socialise and even make a living. While some are diving deep into the world of digital ownership, others are marvelling at their smart home gadgets.



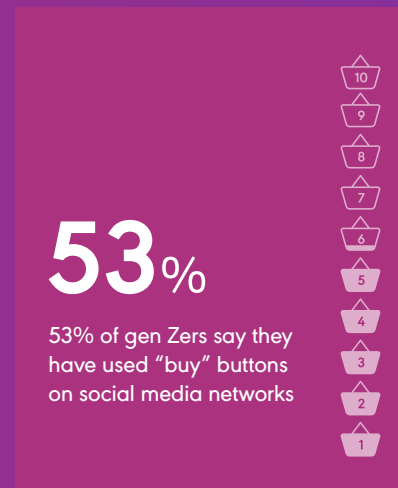
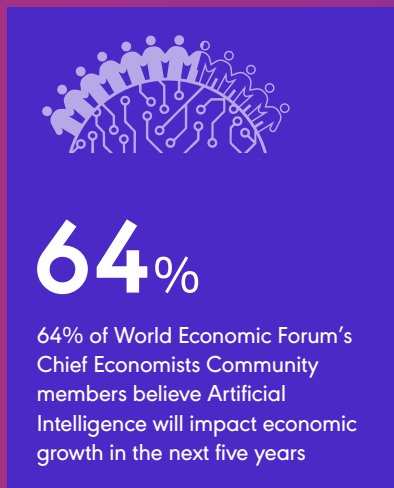
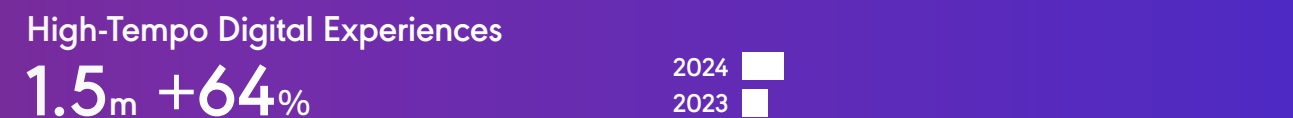
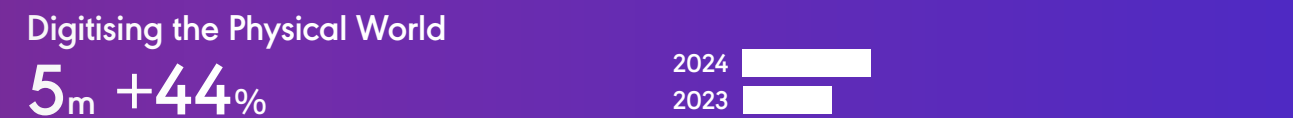
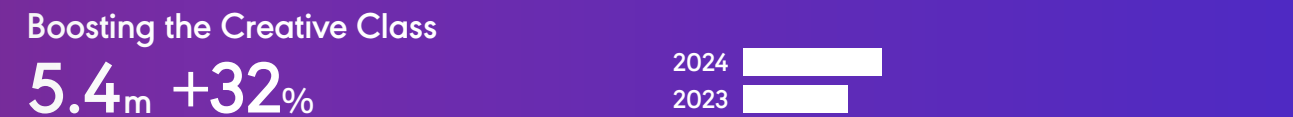
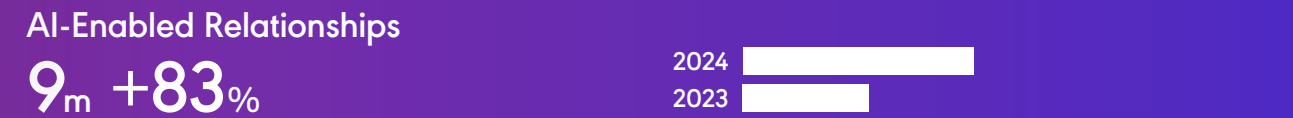
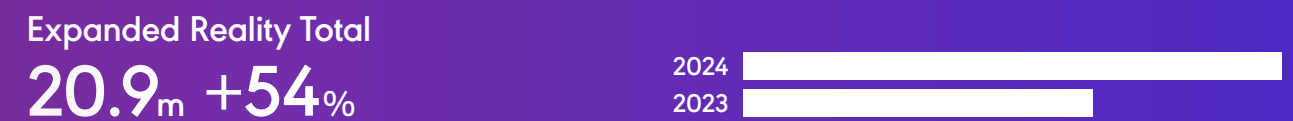
Tanqueray 0.0 activation in Madrid

Consumers in Madrid were delighted by an astonishing CGI activation. A giant bottle of Tanqueray 0.0 was “seen” suspended from a helicopter and poured into a giant glass of tonic 50ft in the air. Another helicopter then arrived to deliver the ice! The activation was launched on social media, generating more than 11m views across multiple platforms, which then saw more than 4m people interacting with the content.



SEE FULL
CASE
STUDY

TRACKING THE TREND 2024



THE CULTURAL CONVERSATIONS

The huge growth area within this trend is, unsurprisingly, AI-Enabled Relationships. In a culture where technological development can move so fast, AI is the future and what used to drive growth in the Expanding Reality trend, (“Conversations within the creative class”), has fallen away. This creative class was booming during Covid – people stuck at home, creating viral content, and for example “dropping” their own podcasts on platforms like Patreon. Now, people still crave that human connection, but it is AI that is bringing people together.



01.

AI revolution

The transformative shift led by AI is impacting industry. Conversations cover the use of chatbots – like the use of the likes of ChatGPT as a go-to for first drafts, generative AI (GenAI) and automation, with discussions around AI’s potential for improving productivity as well as the ethical implications.



02.

Augmented life

Conversations centre around immersive virtual spaces where education, work and gaming merge into new reality. The Expanded Reality industry is growing, with VR and AR solutions transforming how people connect, compete, and share.



03.

Next-gen products and experiences

GenAI is revolutionising consumer support with chatbots, and also connecting our tech and lives in an increasingly seamless way – but 2025 could be the year that smartphones that have integrated next level GenAI will be on the mass market.*



04.

Creative boom

This explores the new creative possibilities unlocked by accessible AI and digital tools, allowing artists, designers and creators to expand their craft through automation and technological enhancements.



05.

Digital ownership

The volume of conversations on concerns over the rise of blockchain is still high. This includes decentralised technologies such as NFTs, cryptocurrencies and Web3, which are reshaping the concept of ownership, banking, and traceability in the digital world.

* <https://www.pnewswire.com/news-releases/deloitte-2025-predictions-report-generative-ai-paving-the-way-for-a-transformative-future-in-technology-media-and-telecommunications-302309433.html>



WHAT CONSUMERS WILL BE LOOKING FOR IN 2025

Tech and human

As we dive into 2025, consumers are craving that human touch in a world where technology is everywhere. It’s no problem to chat with a bot for quick questions. But when it comes to sensitive issues or pressing matters? They want real people. This means brands need to find the right balance between tech efficiency and genuine human interaction.

Offer some adventure

People will be looking for ways to break free from their digital routines. With so much content available, there’s a growing desire for spontaneity and discovery. Brands can tap into this by offering curated experiences or surprises that encourage exploration beyond what consumers typically engage with.

Efficiency wins

As apps and digital services multiply, consumers will want connected tech solutions that simplify their lives. This means platforms where everything works together seamlessly. Brands that create cohesive ecosystems where different technologies play together will win over tech-savvy shoppers looking for convenience without sacrificing quality.

HOW BRANDS WILL ENGAGE IN 2025

AI is your assistant

While more company and brand customer service departments are increasingly utilizing GenAI to run larger parts of the workload, research is showing that consumer preference is for human interaction. Therefore, brands should be smart and use AI to support human agents to deliver high quality customer service.

Beyond algorithms

Consumers will also crave opportunities to break free from their digital routines, so brands should offer spontaneous experiences that encourage exploration beyond personalised algorithms. This could involve surprise promotions or curated events that introduce consumers to new products or experiences they might not have discovered otherwise.

All in one

Brands should consider developing all-in-one apps that consolidate various services into one user-friendly platform. An example of this would be an app that consolidates shopping, fitness tracking and wellness resources into one. Apps like Fitbit Premium and Centr bring fitness, nutrition and mindfulness all into one place – but is there room to do more?

EXPANDING REALITY GLOBAL STATS

North America	Latin America & Caribbean	Africa	Europe	Asia Pacific
9.1m +48%	991k +61%	1.3m +57%	4.4m +56%	4.8m +45%

TREND 04:
BRANDS AND PRODUCTS
FOR AN INCLUSIVE AND
CONNECTED WORLD

COLLECTIVE BELONGING

TREND OVERVIEW

Finding “your people” has never been more important – or interesting. As social platforms multiply, consumers are building “tribes” more creatively, whether that’s linking up with K-pop fans online or joining local activism groups making real change. It’s way beyond clicking “like” – these are deep connections where people show up for what they believe in. Brands are getting the memo too, realising that today’s consumers want to be part of the conversation and help shape what’s next.



Smirnoff “We Do We” – Troye Sivan

In November, Smirnoff unveiled the latest phase of its “We Do We” platform, announcing a partnership with the GRAMMY®-nominated musician Troye Sivan. The platform which went live in over 100 countries in 2023, champions diversity and unity.



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TRACKING THE TREND 2024

Collective Belonging Total
115.5m +57%



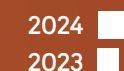
Championing Inclusive Cultures
76.8m +51%



Connecting Passionate Fandoms
32.7m +121%



Brand Built Communities
6m +33%



82%
82% of consumers are likely to follow the recommendation of a micro-influencer (influencers with fewer than 100,000 followers)

Source: Forbes

♥♥♥♥♥
4.25%
Tik Tok has a user engagement rate of 4.25%, higher than any other social media platform (e.g. Instagram 0.6%; Facebook 0.15%)

Source: ClearVoice

1.6bn
In May 2024, Twitch, the user-generated content platform, got over 1.6bn hours of watch time in one month

Source: Streams Charts

THE CULTURAL CONVERSATIONS

Conversations around Collective Belonging remain high in volume – but the characteristics are evolving. We continue to see Diversity & Inclusion matter to people across the globe, but people are now diving deeper into causes and are rallying people to their side. Specific subjects matter even more than the wider concept. We see this through the establishment of empowerment networks in communities and places of work. Digital communities continue to grow – enabling consumers to become co-creators of events or products.



01.

Equal grounds

Consumers are increasingly conscious of their identities when making consumption choices, whether in terms of their age, gender, race, sexuality, neurodiversity or political affiliations. These trends advocate for inclusivity in workplaces, media, politics and daily life.



02.

Empowerment networks

Digital communities and grassroots organisations that unite to solve local and global issues are growing, with a focus on creating inclusive and sustainable solutions. Key topics include promoting access to education, healthcare, and sustainability.



03.

Celebrity tribes

These are fan communities for celebrities, artists, influencers and athletes to cultivate shared admiration, excitement over projects, and live events. While these spaces foster unity, they can also be a place of intense competition and rivalry.



04.

Consumer-brand bonds

Companies build strategies to deepen connections through loyalty programs and collaborative content creation. Consumers become co-creators, participating in events, and contributing to product innovation.



05.

Niche tech communities

In the world there is a place for all. Platforms like Discord are connecting gamers. Digital community platforms bring together blockchain enthusiasts where engagement is incentivised through rewards and referral systems.



WHAT CONSUMERS WILL BE LOOKING FOR IN 2025

Niche is more

In 2025, it's all about nurturing those passion points, no matter how niche they might be. With technology making it easier than ever to connect with others who share similar interests, consumers will be diving into communities where they truly belong.

Deeper connection

Consumers are also looking to connect with brands on a deeper level – not just based on what they sell but on shared values. Consumers are willing to be delighted with authentic messages that resonate with them and align with their beliefs.

Fandoms rule

Do not forget about the power of fandom. Consumers will crave exclusive access and perks – brands should think how best to engage with this. Fans desire the sense of community they can feel amongst fellow fans, especially when appreciated for their passion.

HOW BRANDS WILL ENGAGE IN 2025

Community creation

Brands should tap into the growing desire for authentic community connections by creating spaces – both online and offline – where individuals can come together to share their passion. This could involve hosting events tailored to specific niches or interests, fostering genuine interactions among participants. Brands that recognise these niche markets and create tailored offerings will thrive as they cater to diverse interests.

Positive partnerships

Brands should only actively participate in initiatives that reflect their core beliefs and where they have credibility – i.e. they have championed a cause for long enough that it's part of their brand identity. This could involve partnerships with nonprofit organizations focused on relevant issues, allowing consumers to feel positive about supporting brands that align with their principles.

Reward fans

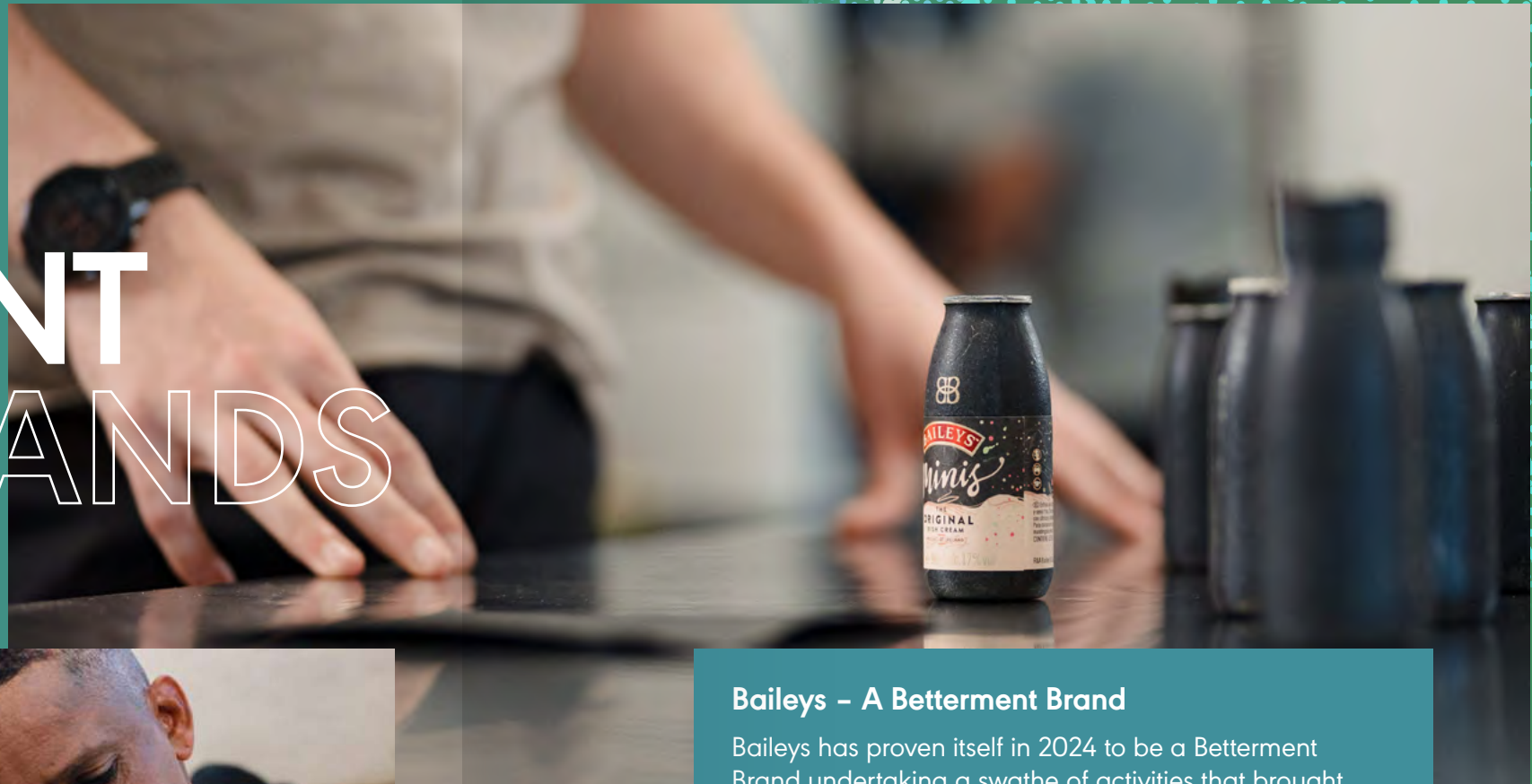
As fandom culture continues to thrive, brands should offer exclusive perks for loyal customers. This could include early access to product launches, special discounts for community members, or unique experiences tied to brand initiatives.

COLLECTIVE BELONGING GLOBAL STATS

North America	Latin America & Caribbean	Africa	Europe	Asia Pacific
59.9m +56%	4.6m +65%	7.3m +57%	21.1m +51%	21m +66%

TREND 05:
BRANDS AND PRODUCTS
FOR A BETTER WORLD

BETTERMENT BRANDS



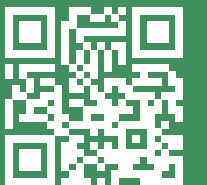
TREND OVERVIEW

The way we consume is getting a makeover. Today's consumers are hunting for brands that walk the walk when it comes to making the world a better place. People are making conscious choices that reflect their values. This shift is pushing brands to step up their game across the board. It's about creating a positive ripple effect that touches everything from local communities to global supply chains.



Baileys – A Betterment Brand

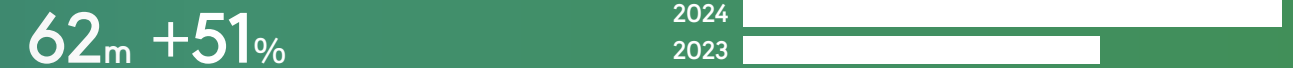
Baileys has proven itself in 2024 to be a Betterment Brand undertaking a swathe of activities that brought it closer to consumers and local communities. This included the Baileys Sustainable Farming Academy, as well as some great packaging innovation, including the Baileys paper bottle trial and launch of Limited Edition Aluminium bottles in the Global Travel channel.



SEE FULL
CASE
STUDY

TRACKING THE TREND 2024

Betterment Brands Total



Social Change and Ethics



Net Zero and Sustainability



Local Wealth



\$74bn

The plant-based food market is projected to reach \$74bn by 2027, driven by increasing consumer demand for healthier and more sustainable dietary options

Source: PwC

\$350bn

The global second-hand clothing market will be worth \$350bn by 2028 and will comprise 10% of the fashion market worldwide by 2025

Source: PwC

80%

80% of consumers say they are willing to pay more for sustainable produced or sourced goods

Source: PwC

THE CULTURAL CONVERSATIONS

While the volume of conversations around Betterment Brands continues to be high, the growth has levelled off and stabilised. The trend is now evolving around concepts such as “Local Wealth”, which showcases the love, support and indeed pride that people have in local communities. But while conversations remain high deeper analysis shows that there remains a big “say-do” gap in Betterment Brands, with people doing far less than perhaps they say. The conversations are, in fact, being led by corporations, more than consumers.



01.

Planet positive

The conversations are future focused, embracing environmentalism covering areas such as reducing waste, eco-friendly packaging, carbon footprint awareness, wildlife conservation awareness, sustainable energy and technology.



02.

Plant-powered couture

Veganism is permeating food, skincare and fashion, so consumers are discussing the benefits and challenges of the dietary lifestyle and choosing brands that are creating humane products with sustainably sourced ingredients.



03.

Second-hand soul shopping

Shoppers love sharing their discoveries from charity shops, second-hand stores, and online. They're excited to showcase discounted designer pieces and enjoy spending their free time browsing. Clothes, books, and cars are the most commonly discussed products.



04.

Conscious cash flow

Consumers are prioritising transparency in their purchases, seeking brands that adhere to ethical practices and sustainable business models. And there's an evident shift towards renting products instead of buying.



05.

Hyperlocal love

Conversations focus on fostering community spirit through local initiatives. Consumers emphasise the importance of locally sourced goods and building stronger communities through hyperlocal commerce.



WHAT CONSUMERS WILL BE LOOKING FOR IN 2025

A nostalgia explosion

In 2025, nostalgia is going to fuel the second-hand shopping movement as consumers realise vintage items often boast better quality than fast fashion alternatives. The resale market is expected to hit \$77bn this year*, and shoppers will love hunting for unique treasures while promoting sustainable habits.

Is it local?

Consumers will also be on the lookout for hyperlocally produced products. This trend reflects a desire for authenticity and quality over quantity – a shift towards valuing craftsmanship in a world filled with fast fashion.

Sustainability tips

Shoppers will seek guidance on how to shop more sustainably. They'll want tips on identifying sustainable materials or understanding eco-certifications to help them make informed choices without feeling overwhelmed by options. Consumers want to be empowered in their decision-making, while building trust through transparency.

HOW BRANDS WILL ENGAGE IN 2025

Second-hand shopping

Brands should embrace this trend by highlighting the quality and uniqueness of vintage items. Creating campaigns that celebrate the stories behind pre-loved goods will resonate with consumers who appreciate sustainability and craftsmanship.

Go local

As consumers increasingly seek locally produced goods, brands should emphasize their commitment to supporting local artisans and businesses. Highlighting the benefits of purchasing locally will appeal to shoppers willing to pay a premium for authenticity. Brands can create partnerships with local producers or showcase regional products prominently in marketing efforts.

Educate to connect

Providing guidance on sustainable shopping practices will be essential as more consumers look for ways to make responsible choices. Brands should offer clear resources – like blogs, videos, infographics – that explain how to identify sustainable materials and understand eco-certifications.

* <https://www.purelondon.com/pure-london-blog/retailers-invest-resale-market>

BETTERMENT BRANDS GLOBAL STATS

North America	Latin America & Caribbean	Africa	Europe	Asia Pacific
34.7m +45%	1.7m +90%	2.5m +76%	10.8m +64%	11.6m +53%

THOUGHTS FOR THE LONG TERM



The first Distilled Foresight Report was launched in December 2023, using the Diageo Foresight System. This data system was described by Giles Hedger, Diageo's Global Consumer Planning Director, as "the 'Hubble Telescope' of Diageo's insight work, allowing us to detect and track long-term consumer shifts".

Distilled 2025 has dug deeper into understanding "Cultural Signals" using supervised machine learning.

By **Alberto Romano**
Global Futures and Culture Planning, Diageo

This has enabled the Report to bring to light today's expressions of each trend. Being able to get a deeper understanding of global consumers and the evolution of their tastes is key.

Having access to this understanding, also enables us to see what issues and ideas brand owners and companies need to keep an eye on over the coming years. Here are my four key takeaways from Distilled 2025.



Embrace AI responsibly and authentically

Brands need to acknowledge both the transformative potential and the anxieties surrounding AI. As such they should approach AI implementation ethically and transparently, focusing on applications that enhance consumer experiences, foster creativity, and improve efficiency. This includes addressing concerns about data privacy, job displacement, and the authenticity of human connection in a digitally mediated world. Consumers are becoming increasingly discerning about the use of AI, particularly when it comes to imagery. Brands should be upfront about when and how they use AI-generated content, ensuring that they are using AI responsibly and ethically.



Transcending the old and new

The need for connection and belonging remains strong. Brands can foster collaborative spaces, both online and offline, that empower self-expression and cater to diverse needs. But at the same time demand for so-called "dumb phones" and old-style flip phones is growing as consumers look to create distance from the barrage of information from smart devices. Therefore, brands need to be ready for a world in which younger generations are keeping smart devices and social media at arm's length. This may involve developing engaging offline experiences and products that encourage creativity and real-world social interaction. They should also consider how to design services that don't depend on smartphones or that offer a more content-limited experience.



Embrace the "Escape the algorithm" trend

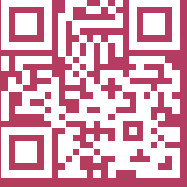
The conversations suggest that consumers are seeking experiences that offer a break from the curated and often homogenous content they find online. Brands can tap into this desire by offering:

- **Exclusive, invite-only experiences:** These can provide a sense of exclusivity and discovery that is difficult to replicate online.
- **Craftsmanship-focused experiences:** Highlighting the care and attention that goes into creating products or services can appeal to consumers seeking authenticity and meaning.
- **Curated local guides:** Partnering with local experts can provide insider knowledge and help consumers discover hidden gems that haven't been overrun by social media hype.



Acknowledge the transition of traditions and adapt for relevance

Global shifts such as climate change, AI advancements and demographic changes, are forcing a reassessment of traditional norms. Brands need to demonstrate an understanding of these transitions and adapt their products and messaging accordingly. Consumers are prioritising solutions that meet their basic needs and support their lives on a functional level. In a world saturated with information, consumers are discerning about who and what they trust. Brands can cultivate trust by prioritising clear communication and demonstrating a genuine commitment to consumer well-being. This involves being transparent about data practices and offering products that deliver on their promises.



SEE FULL REPORT

