



**I want moments of discovery and delight that enhance my day, sharing exciting stories and spaces with others...**

## Value-creation networks

product journeys and stories AR and VR  
enhancement

New space **rise of the**

design **storyteller culture**

**digital & physical experience design**

**experiences merge** peer-to-peer sharing  
and exchange

Rise of service,  
experience and time  
exchanges **trusted reviewer networks**



90%

of global consumers  
believe that **prioritising  
experiences over material  
possessions** is important in  
their personal life

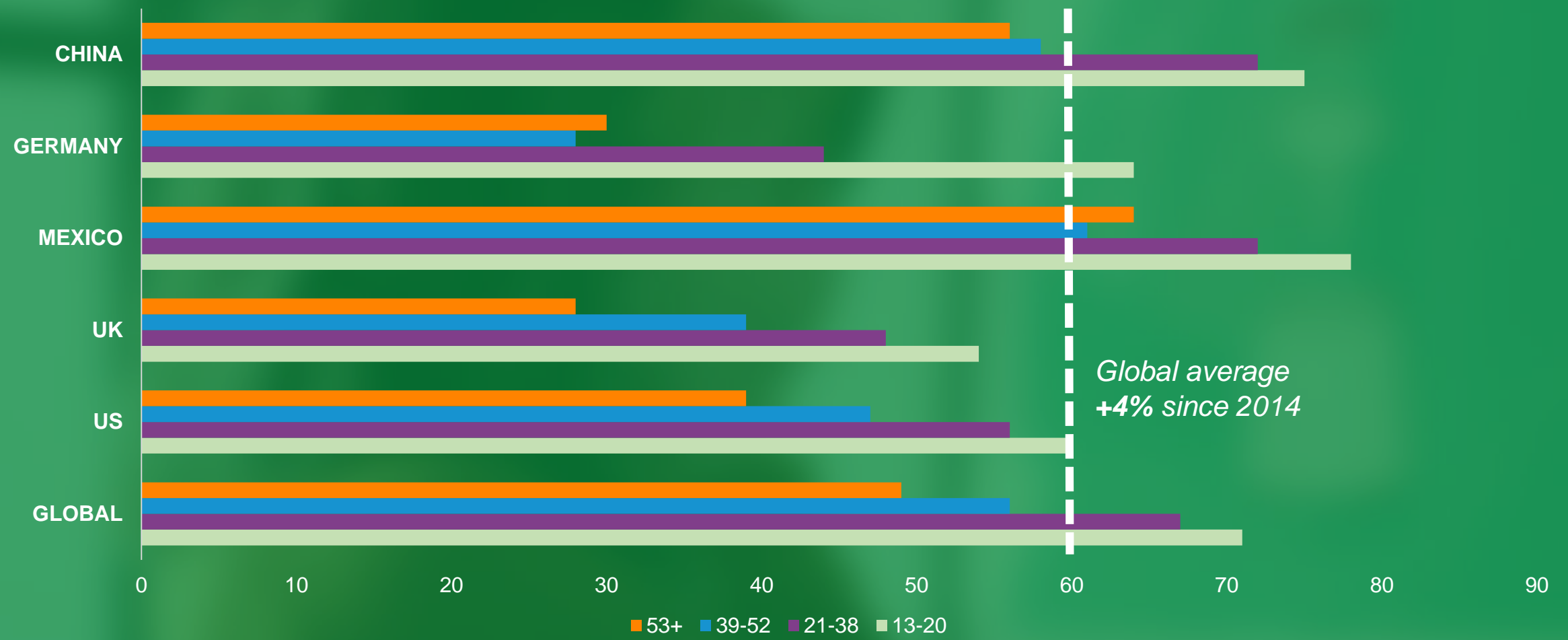
Kantar Consulting Global Monitor 2018



# ENGAGING Experiences

*"I am always looking for new experiences and sensations that will liven up my everyday activities"*

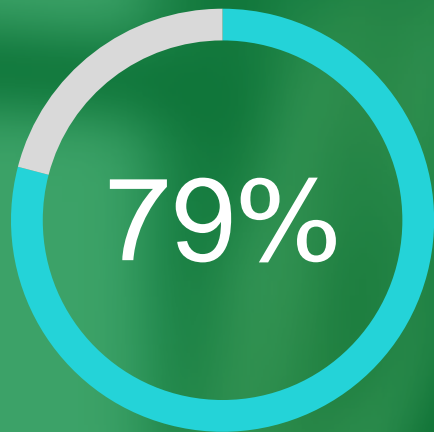
(% agree)



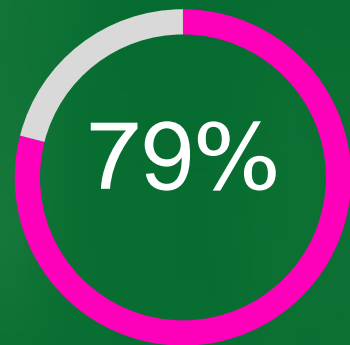
ENGAGING  
*Experiences*

“How likely are you to splurge on out-of-home leisure activities with family or friends, (e.g. eating out at a restaurant; visiting the cinema, sports events or theme parks)”

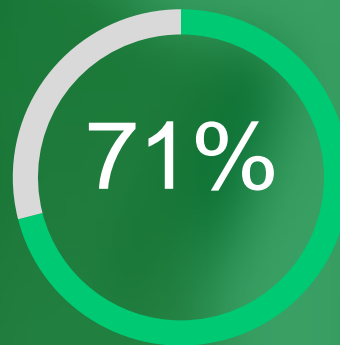
(% very/somewhat likely)



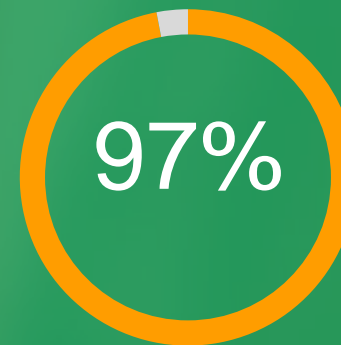
**Global**  
~0% since 2015



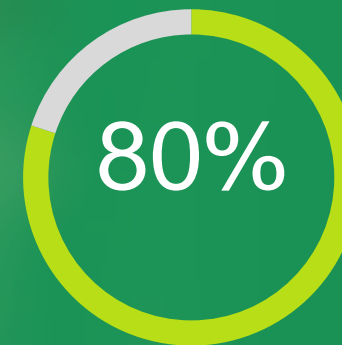
US



UK



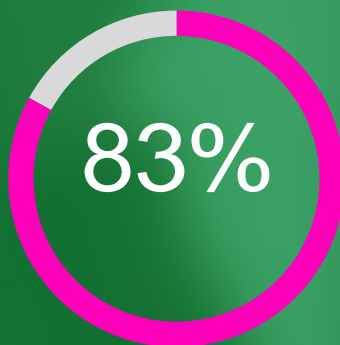
Mexico



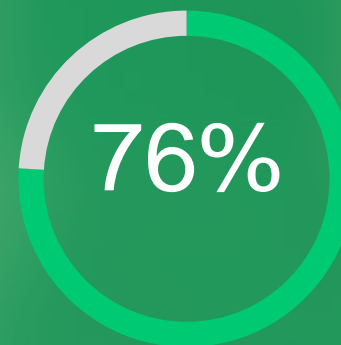
Germany



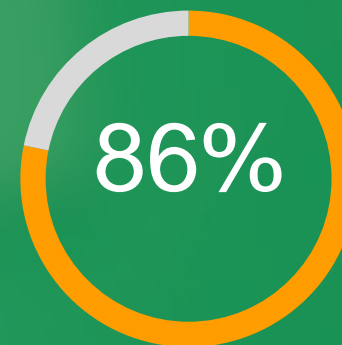
China



Malaysia



Japan



South Korea

Likelihood to spend on engaging experiences out of home remains very high in key markets

WHAT'S DRIVING THE TREND?



Multipolar  
World

Whilst productivity booms in a few markets, post-materialism sweeps developed markets and new experiences and cuisines are brought to different markets around the world

Previously marginalised groups gain louder voices, where once the US and Europe dominated, developing countries are now in an increasingly powerful position – reflected in new food fusions and international flavour hubs in cities



Growing Digital  
Connectivity

The continuing breadth of social connectivity is upending the way we communicate and experience the world, and each others' worlds.

58% already say they are on the internet constantly throughout the day (vs 49% in 2015).



Changing lifestyles and  
household structures

People's openness to non traditional routines and careers goes hand in hand with the new generations of consumer who prioritise *experiences* over material possessions

58% of Millennials say it's "extremely important to prioritise experiences over material possessions", vs 48% of the generation before.

## WHAT'S DRIVING THE TREND?: DRIVERS



### Multipolar World

Growing economies and connectivity in certain markets is opening up new worlds of experience and excitement to new markets of consumers



### Growing Digital Connectivity

New pools of consumers get connected, Qatar has at least 2.3 million cell phones in a country of around 2 million people where 34% of consumers own a tablet.<sup>2</sup>



### Changing Lifestages & Household Structures

Globally, more Millennials will be pursuing a variety of unique lifestyle paths and are deferring getting married. In China, the average age women are getting married in 2015 was 27, vs 20 in 1950.<sup>3</sup>



# ENGAGING *Experiences*

## HOW IS IT MANIFESTING?: SUB-TRENDS

### Story Culture

We see a global proliferation of consumers as storytellers and curators of their day-to-day lives, sharing streams of mini moments with their online networks

### Sensory Experiences

Advancing technologies enhance and add entertainment to moments of consumption, playing with the senses and perceptions of reality

### Peer-to-peer Engagement

Consumers access and exchange all kinds of experiences through platforms that enable peer-to-peer in all realms of their lives

### Food Fusions

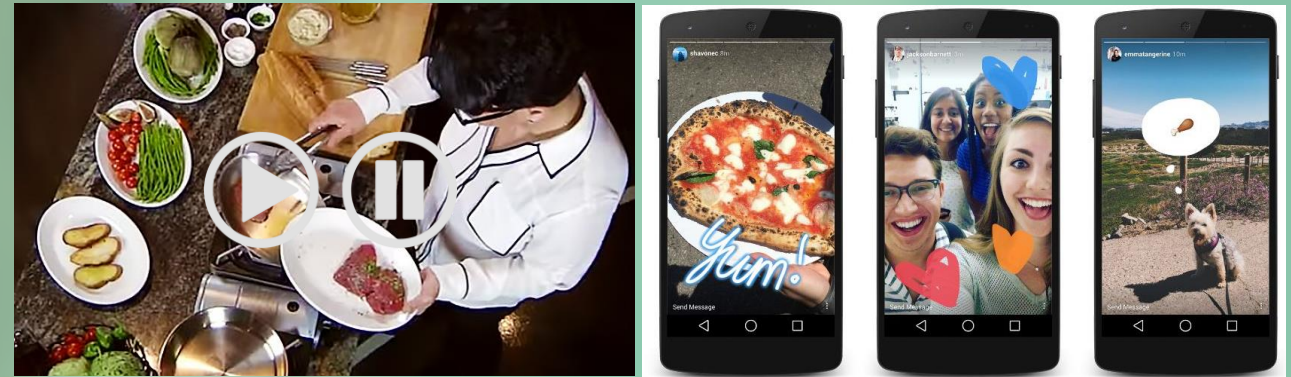
Intensifying multiculturalism in urban areas is leading to breakthrough culinary hybrids at both high-end and in the mainstream



# ENGAGING *Experiences*

We see a global proliferation of consumers as storytellers and curators of their day-to-day lives, sharing streams of mini moments with their online networks

## STORY CULTURE



### HOW IS IT MANIFESTING?

*Through the eyes of our Streetscapers...*



Mexico

*"We spend most of our time on social media and this is how we project who we want to be. Social media has gained a whole new role as we record and take pictures of everything so that others can see and aspire to our lives."*

*Marianna, Mexico*



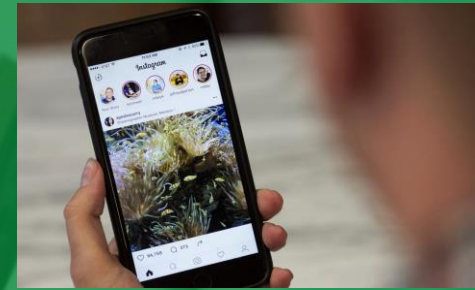
South  
Korea

*Activities evolving around when and how we share experiences online are widespread. A lot of people go on hot restaurant tours, creating their own version of Michelin guides and posts instagrammable dishes on social networks."*

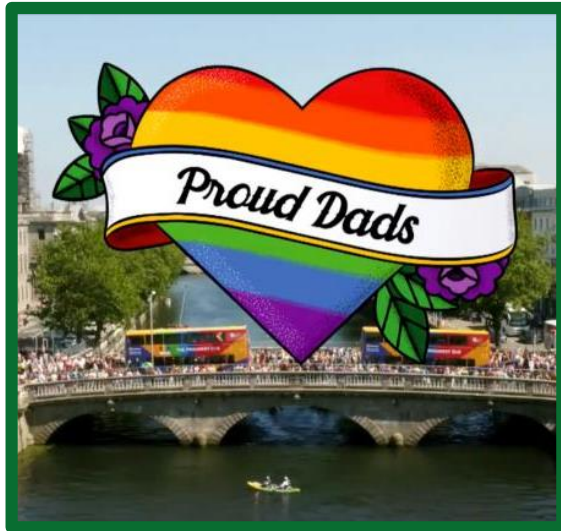
*Gageong, South Korea*

# ENGAGING Experiences

## Story Culture



More than 500 million Instagram users open the app every day, and **300 million** of them are watching Stories daily.<sup>1</sup>



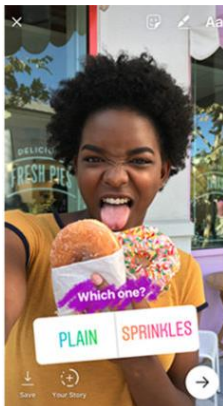
Virgin Red “Keys to the Kasbah” takes consumer engagement to the next level with set missions and tasks to win prizes.

Virgin invited consumers to undertake "secret agent" missions and complete tasks, capturing efforts via video to win a stay at the Kasbah Hotel. Consumers became characters in the campaign's story, unlocking different rewards by completing tasks and engaging with the brand online. It shows a new type of marketing where consumers no longer accept being talked to but want to take part in an experience & the full story behind a brand they are interacting with.



The Body Shop leveraged the sharing of day-to-day clips using vegan influencers in order to reach their desired audience.

Embedding their skin product in casual story snippets of the lives of influencers revealed the effectiveness and ease of the vegan products – which required no editing to look good.





# ENGAGING *Experiences*

Advancing technologies enhance and add entertainment to moments of consumption, playing with the senses and perceptions of reality

## SENSORY EXPERIENCES



### HOW IS IT MANIFESTING?

*Through the eyes of our Streetscapers...*



Chile

*“There is a huge appetite for experiencing the context and culture of world foods and how that can be brought into the environment it is being consumed in”*

*Stefano, Chile*



USA

*“Apps are being developed to let you dine under the sea or at a rural hillside in Italy from home or a budget hotel; sip Californian wine whilst VR takes you to the vineyards it was made in... for tourism this creates a long-lasting experience and encourages people to visit the area.”*

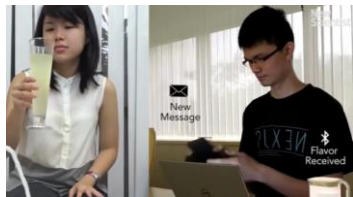
*Vincent, USA*

# ENGAGING Experiences

## Sensory Experiences



Creating a fully immersive and stimulating experience around the food, Quince in San Francisco serves 'A Dog in Search of Gold'. It consists of chestnut crisps, celeriac, porcini and ricotta truffle, served on an iPad playing a video of a dog searching for truffles.



### Whisky River in Black Rock Bar

Guests drink from a "river of whisky" contained in an old oak tree.

The venue adds a different label each week to one of the "rivers", creating an ever-evolving house blend.



### Geolocation podcasts, Echoes

Echoes invites everyone from around the world, from global travellers to street artists, to share stories from the communities they live in for anyone to download and listen to whilst immersed in the physical space the podcasts relates to.



# ENGAGING Experiences

Consumers access and exchange all kinds of experiences through platforms that enable peer to peer in all realms of their lives

## PEER-TO-PEER ENGAGEMENT



### HOW IS IT MANIFESTING?

*Through the eyes of our Streetscapers...*

*"With the help of social media, such as Facebook and blogs, consumers create networks for exchanging information about products and brands"*

*Julian, Vietnam*



Vietnam



Japan

*"There are huge virtual communities coming together around the online sharing of food and experiences. There are TV shows and YouTube channels dedicated to people sharing what they eat and food companies are launching items to target these consumers."*

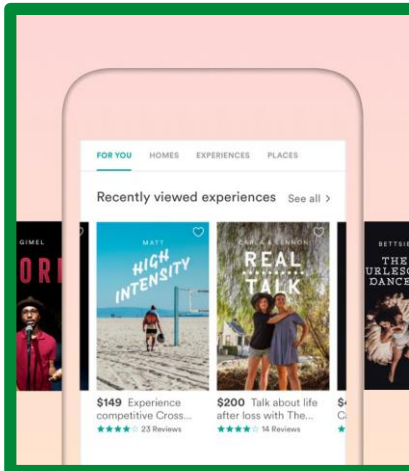
*Patrick, Japan*

# ENGAGING Experiences

## Peer-to-peer Engagement



Between the five key sectors of automotive, hospitality, finance, staffing and media streaming, PwC estimate the revenue generated by the sharing economy will increase from the current \$14 billion to \$335 billion in 2025.<sup>1</sup>



Tesco became the platform through which consumers could connect and express their feelings in the Food Loves stories campaign

The campaign centred around the person behind the recipe and the relationships they hold around a dish



Peanut allows mothers to connect and access experiences based on shared interests outside of motherhood

It even extends to sharing and exchanging skills whilst on maternity leave



# ENGAGING *Experiences*

Intensifying multiculturalism in urban areas is leading to breakthrough culinary hybrids at both high-end and in the mainstream



## FOOD FUSIONS



### HOW IS IT MANIFESTING?

*Through the eyes of our Streetscapers...*



Chile

*“Santiago is shifting into something more alive, challenging and captivating - embracing diversity and becoming a real multicultural city [...] we’re enjoying foreign foods and festivals especially”*

*Stefano, Chile*



USA

*“The proximity of diverse foods in the new American pallet has created an appetite for fusions foods. Some blend a new cuisine with something more familiar and others create something more creative and new, like Korean-Mexican tacos trucks.”*

*Vincent, USA*

# ENGAGING *Experiences*

## Food Fusions



**62% of 18-22 year-olds** say they cook international cuisines at home from social media, compared to 46% of Millennials (23-38), and just 23% of Gen X consumers (39-52)

(modernrestaurantmanagement.com, US study, July 2018)



### Eastern techniques in Danish cuisine

Michelin-starred chef Jonathan Tam uses bamboo steamers for several of his Restaurant Relae dishes, a clear move away from European techniques of boiling or blanching, and a much more entertaining 'reveal' as part of a dining experience



### Street food leads in breakthrough combinations

With vendors like 'Saucy Porka' dishing up Vietnamese-Puerto Rican dishes on the edge of Hyde Park, Chicago





# WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

## IT IS THE PERFECT EXPERIENTIAL SPACE PARTNER

These new social spaces need to be seen as lucrative new channels for food and drink brands.



## IT IS AN EXCITING CHARACTER IN A CONSUMER STORY, NOT THE STORY ITSELF

Creating a Story online is not only easy, but effective: one in five Stories generates a direct message from followers.<sup>1</sup>



These interactions reach thousands and provide Instant market research and reaction data; the key is creating products that spark imagination for story creation.

## IT USES VR/AR TO UNLOCK WORLDS AROUND THE BRAND

From first encounters in retail settings to virtual second life for packaging, and virtual loyalty programs, enabling brands with AR & VR taps into consumer desire for experience.

