



# ZENITHOPTIMEDIA'S 2014 EMERGING TOP 10 TRENDS

HARNESSING THE  
POWER OF  
SELF-EXPRESSION

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ZenithOptimedia's 2014 Emerging Top 10 Trends: Harnessing the Power of Self-Expression' report shares our thoughts on the driving forces behind the trends that will shape 2014. How are these trends related to one another? How will they influence the ways brands engage with consumers in the coming year? Our track record shows that we were spot on for most of the trends we projected for 2013. Now, we're tracing how these trends will evolve in 2014. Looking ahead, we take into account how our projected 2014 trends are linked to the six macro trends we listed in '2038 – Six Trends for the Next 25 Years,' the future-facing report that marked ZenithOptimedia's 25th year anniversary. Using these reports, marketers will be able to plan ahead for the coming year and look beyond 2014 for how these trends will affect their businesses in the long term.

## ZENITHOPTIMEDIA'S EMERGING TRENDS IN 2013



## 2038 – SIX TRENDS FOR THE NEXT 25 YEARS



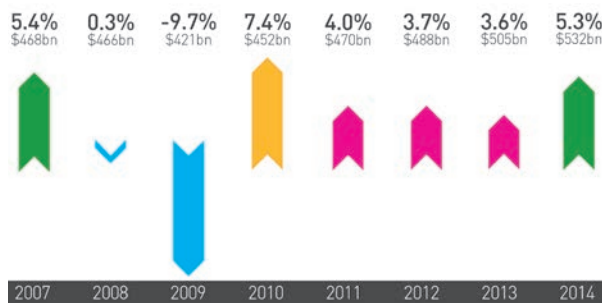
# 4 KEY DEVELOPMENTS SHAPING 2014 EMERGING TRENDS

To identify 2014 trends, we studied key developments and recurring themes in the following four key areas: global economy; social changes; technological progress and entertainment and media development. This gave us the big picture of which consumer values and needs will be behind the adoption of 2014 trends.

## 1. GLOBAL ECONOMY BRINGS HOPE AND CAUTION

For the first time in ten years, the global economy is set to have a strong period of sustained growth. It is encouraging to see growth forecasts for 2014 for both global GDP and ad spend returning to pre-recession levels. 2014 sees a flip in economic influence, with global economic superpowers back in the driver's seat. The USA, Japan and even some Western European countries will enjoy renewed growth. Meanwhile, the big rising markets like the BRIC (Brazil, Russia, India and China) economies, who were poised to help pull the world out of recession in 2013, have stumbled a little as reduced demand in developed nations has dented export revenues.

### A steady recovery in global adspend



Source: ZenithOptimedia

Despite the positive outlook for the coming year, consumers worldwide remain concerned about the volatile economic changes and growing inflation of recent years. The middle classes were once sure to afford comfortable lifestyles. However, today's middle class finds themselves squeezed, as high inflation and taxes erode much of their salary. From 2010 to 2013, the values of simplicity, thrift and making choices have gained ground with consumers across the globe, if at different intensities in developed and developing markets (Source: Iconoculture).

There is growing consumer confidence, especially in stronger economies in Q3 2013 (Source: Nielsen). Beyond the economy looking up, we believe the changed mood is due to consumers getting better at adapting to change and specifically improving at taking control of their finances. For most people, the way to cope with volatile economic change is coming to terms with the thought that 'life goes on and I cannot have it all'. They are now more aware of what they can do better and what they can do without. Consumers are constantly asking which purchases are essential to happiness, which ones help them establish who they are and what they stand. Most importantly, they choose not to compromise on quality when it comes to life experiences. Marketers will need to find meaningful roles for brands in line with consumer values as they continue to experience the ups and downs of the economic cycle.

## 2. SOCIETY CHAMPIONS UNITED CAUSE

One of the key developments transforming society in recent years in both developed and developing markets is the strong need to be associated with like-minded communities beyond geographic boundaries. When social networking sites first emerged, we were interested in making friends, even if we had not met, spoken or have much in common with them. Today's online communities foster real life friendships, uniting individuals with shared values, interests and experiences. The shift in how we form communities today is driven by the desire to establish authentic and meaningful relationships which can provide comfort, security and inspiration. Once again, people want the 'real' human touch. Especially in tough times, we retreat to our local community for support. In recent years, we have also seen how solidarity in fighting for social causes and against political injustice has given people the hope and strength to overcome challenges.

The feeling that 'we are in this together' encourages people to share experiences and collaborate. Collective wisdom helps individuals be open and receptive to new ideas, draw on each other's expertise and challenge each other to create something better, together. The sense of mutual trust and reliance on the community maximises the success of working together. The community also provides people with an identity they want to be associated with. It is time for marketers to take their social network communities and local communities seriously. This means establishing authentic relationships, identifying true fans and finding ways to collaborate with these communities. This in turn will mean delivering better products and services and championing causes that benefit communities' overall wellbeing and the environment.



### 3. SMART DEVICES KEEP TRACK

The demand for a connected lifestyle in 2013 was driven by rapid growth in mobile devices ownership, uptake of mobile internet access and free mobile apps to take full advantage of enhancements in the phone-user interface. In 2014, we can expect growth in the demand for smartphones and tablets to shift from developed to developing markets. The number of active smartphones and tablets are expected to double, from the present one billion to two billion in 2014 (Source: Flurry). Growth is expected to stem from mid-tier smartphones in mature markets and low-end Android smartphones in rising markets (Source: ICDC). Another boost from telecom providers for the smartphone and tablet markets in rising economies comes through better and wider 3G/4G deployment.

Analysts are predicting 2014 as 'the year of wearable devices', but there are huge discrepancies in projected adoption rates. Wearable computing devices are tiny computers users can wear on their bodies. Some devices are clipped to clothing, others worn as glasses or smartwatches. They serve as recording and monitoring devices that track users' motions, location, telling us about changes in their minds and bodies. These devices also record and track the world around them. Wearable devices promise a near future of self-knowledge, sensors and superpowers. There is a sense of intimacy with the device; it understands what the user is going through and can serve as a real time concierge.

In the future, we can expect mobile and wearable devices to help users master their personal abilities and self-knowledge. It is no longer sufficient to be 'always-on'. Being 'switched-on' about themselves and what goes on around them will encourage curiosity, appetite to discover and immerse themselves in that moment and place. Having access to their personal data and real-time content lets them be in control of their situation whether at work or play. Marketers will need to identify how they can add the value that's needed if they're to book a spot in the consumer's mind and body.



### 4. ENTERTAINMENT FOR HIGH LEVEL PLAYER

Today's society expects us to make the most of our lives by cramming experiences in every moment. This drives consumers' strong desire to adopt 'always-on' lifestyles. People are strongly in favour of paying for real-time entertainment as they seek the latest, high quality and relevant content that inspires, delights and lets their imaginations run wild. Powered by a wealth of personal data about the individual's needs and interests, they will be served relevant and personalised content. Good content will also make its way to individuals or communities through the proliferation of consumer bulletin boards that distribute content, like reddit and Story Summaries on the New Yahoo! app. Flipboard, the customised social network aggregation platform that collects and curates the individual's favourite content, turned out to be a hit.

At the same time, there is a shift in how people relate to content, moving from just curating content as self-representation, to creating content as a form of self-expression. This is the dawn of our 'Democratisation of Content Creation' (listed in ZenithOptimedia's '2038' report). Individual content producers make content for the wider public and not just their social circle. We have seen individual content producers achieve celebrity status, commanding followers in the millions. It is time for marketers and mainstream content producers and distributors to consider collaborating with them.

We have also come to expect mobile devices to be seamlessly integrated with our in-home devices, providing on-demand entertainment. Gaming consoles like Xbox and PlayStation now come with a suite of entertainment apps and biometric features. Facial recognition, voice activations and hand movement sensors make it possible to recognise players, take instructions and even offer recommendations. This allows our 'converged living room' to be converted into a powerful entertainment hub that attracts active participation and social viewing. In 2014 and beyond, marketers need to embrace this spirit of play and rethink how to shape customised brand experiences that can be acted out in the living room.

# ZENITHOPTIMEDIA'S 2014 TOP TEN TRENDS: HARNESSING THE POWER OF SELF EXPRESSION

Against the backdrop of the unsettled global economic situation, consumers have learned to be resilient, ready to face whatever challenges come their way. They aim high, look to lead fulfilling lives and are eager to reach their personal best. They also find time to play, indulging themselves with meaningful experiences that enrich their lives and help define who they are. They find collaborations with like-minded communities fulfilling, not just in establishing authentic relationships but also in opening up a world of mutually beneficial creativity. Consumers seek self-knowledge, looking for how they can make the most of where they are in that moment and how can they fit in and add value to their community.

In 2014, we predict the top ten prevalent trends will inspire brands to help consumers discover ways to express themselves and tell powerful stories about their experiences.

- 1 EXPERIENCE QUEST**  
JOURNEY TO SELF DISCOVERY  
Illustration: A hand holding a coin, a piggy bank, a passport, a photo of Paris, and a 'Wish List' note that says 'Trip to Paris!!'.
- 2 THE GOAL WRIST**  
MEASURING PERSONAL SUCCESS  
Illustration: A hand with a smartwatch displaying a heart rate and a 'GOAL REACHED' notification.
- 3 COMMUNITY CONSUMPTION**  
ROOTED IN SELF INTEREST  
Illustration: A group of diverse people in a white van, with one person holding a laptop.
- 4 PHOTOGRAPHIC TIMELINE**  
SMART SHOWCASE OF SELF  
Illustration: A timeline of Polaroid photos from January 2014 to July 2014.
- 5 CREATIVE COLLABORATORS**  
UNLEASH UNIQUE TALENT  
Illustration: Four people (two women and two men) holding various creative tools like a camera, a pen, and a document.
- 6 DEATH OF PIRACY**  
RISE OF ON-DEMAND CONTENT  
Illustration: Hands holding a cloud of content icons including Netflix, Spotify, and LoveFilm.
- 7 THE IMMERSIVE THEATRE**  
MULTI-FACETED SCREENS  
Illustration: Four people sitting in a row, each holding a different gaming device (console, handheld, etc.).
- 8 BIOMETRIC PURSUIT**  
MAKING SENSE OF EMOTIONS  
Illustration: A woman's face with various biometric sensors (heart rate, eye tracking, etc.) overlaid.
- 9 INTIMATE ADS**  
OPTING IN TO SHOP  
Illustration: A woman at a laptop with various shopping-related icons like 'SALE', 'SALE', and a shopping bag.
- 10 HIGHTSTREET TO I-STREET**  
REINVENTING IN-STORE EXPERIENCE  
Illustration: Two women in a store, one pointing at a digital display that says 'Touch to colour'.



In the spirit of 'Life goes on, I can't have it all', consumers choose to hunt for new and original experiences to be immersed in. Experiences define the person; consumers come into being by doing. Instead of indulging in purely material products, they jump off the beaten track to gather truly personal encounters that sets them apart from their peers. With information about everything from travel to fashion and food at their fingertips, people want to escape mass tourism and chain consumption. They pursue unique and personal experiences that give them a sense of the local and genuine. The wish for a sense of community translates into a mindset where meeting and sharing ultimately forms the foundation of highly individual, shareable stories. Brands need to harness these desires and offer unique experiences while allowing consumers to tell their stories.

### FACTS:

- Experiential marketing increases overall and spontaneous brand awareness, purchases and recommendations by more than 50%

Source: BrandVitality

- 95% of consumer respondents said participating in a recent event made them more inclined to purchase the products promoted

Source: BrandVitality

- 70% of buying experiences are based on how the customer feels they are being treated

Source: McKinsey

### BRAND ACTIONS:

- Identify your brand's role in igniting consumers' values and passion so they consider it part of a story worth telling
- Define the type of exchanges that are truly valued along the consumer pathways
- Design integrated brand experience map across different touch points to create meaningful and memorable engagement

### EXAMPLE: EUROSTAR: STORIES ARE WAITING

Travel is perhaps the ultimate example of the experience quest. Eurostar has gone beyond this to compile consumers' experiences. In the 'Stories are Waiting' competition, customers were invited to explore Paris and London, sharing their experiences through stories, photographs and video footage. Submissions were used to create two Eurostar ads (a French one for London and an English one for Paris). The French ad was narrated by a British accent, and the English one by a French accent, adding local colour. The clips highlighted the serendipity of travel, as all experiences depend on as little as making a left or right turn.

People are bored of mass touring around a checklist of scenic spots. Now, they're trying to discover the hidden gems of cities instead. Many entries of the competition featured authentic places, characters met or food eaten. Eurostar used this quest for exceptional encounters, giving consumers the chance to share personal stories. The railway service aims to connect people and places; it can now also be seen as a connector of experiences.





The challenging economic environment drives people to stay on top of things, both physically and mentally. They are constantly challenging themselves and setting goals. Fitness wearable devices are a great way for users to gauge their fitness levels and benchmark their performance. Their personal record is a testament to their self-discipline, effort and determination to be the best they can be. Harnessing the power of data helps identify the small changes they can make to improve themselves, bringing together different data helps them discover what drives them and their productivity. Sharing data with friends or like-minded communities is a great motivator in spurring them on. This is clear from the thousands of Quantified Self communities emerging around the world, who meet regularly to share how they put their personal data to good use. Brands will need to understand the measurements that are highly valued by their consumers and if there is any role at all for them to help them achieve their goals.

### FACTS:

- 90% of consumers value the role brands play in enabling their personal goals

Source: Edelman Brandshare

- A total of 40% smartphone users want their phone to log all of their physical activities and 56% would like to monitor their blood pressure and pulse using a ring

Source: Ericsson

- One in three respondents in the UK and US who wear wearable devices in the UK and US said wearable tech has 'helped their career development'

Source: ZDNet

### BRAND ACTIONS:

- Identify an unfilled need that the user is looking for and facilitate tracking it
- Use gamification for wearers to compete against themselves or others and reward wearers for good behaviour
- Provide highly personal and relevant content based on surroundings and context, based on wearable technology experience factors

### EXAMPLE: CREDIT FOR ACHIEVEMENT

AchieveMint, a San Francisco based startup, has designed a platform that aggregates data from select fitness, health and social networking apps (like Fitbit, RunKeeper, MapMyFitness) and rewards the user with points for healthy behaviour. Going for a run, tweeting something 'healthy', checking-in to a health food store or doing anything else that's vaguely related to health is tracked and the user rewarded with points on the free service. Once they collect enough points, they can convert them into merchandise or cash. One thousand points is equivalent to \$1. The merchandise or cash comes from sponsors who want to motivate people to be healthy. AchieveMint previously partnered with the Brooklyn Nets basketball team, encouraging users in and around Brooklyn to earn special rewards, such as VIP tickets to the draft or signed merchandise. AchieveMint is also a community-driven platform where users can share data and get insights to help manage fitness goals. Once a huge amount of information about behaviours has been compiled, the crowd itself effectively becomes the instructor, coaching users to help themselves.



# 3

## COMMUNITY CONSUMPTION ROOTED IN SELF INTEREST



Widespread community consumption is becoming the reality in 2014, as creative initiatives of collaborative consumption have been springing up to deal with the effects of the recession. As lifestyle adjustments become more permanent, consumers have realised that they can lead good, even better, lives for less. Financial insecurities have led people to become thrifter while cherishing the support of their communities. Sharing with peers has become a new way to optimise one's lifestyle while enriching it with a personal human connection. Moreover, as the efficiency of sharing also addresses environmental concerns and exemplifies a generally fun and flexible way of life, the preference for access over ownership (and all its resulting obligations, costs and responsibilities) has become a key component of self-expression for consumers' identities. The list of innovative start-ups that facilitate peer-to-peer sharing is growing by the day, and larger brands are tapping into this trend as well.

### FACTS:

- In the past two years, 1 in 2 Americans have rented, borrowed, or leased the kinds of items that people usually own

Source: SunRun

- Peer-to-peer financial lending market will reach US\$6 to 7 billion in the next 12 months

Source: Lending Memo (January 2014)

- 'Sharing' and 'rental' economies will generate \$US3.5 billion in revenue in 2013, and grow to as big as \$US110 billion over the next few years

Source: Marketingmag.com

### BRAND ACTIONS:

- Leverage or build your own community to partake in peer-to-peer business
- Facilitate peer-to-peer sharing for your current consumers to complete their brand experience.
- Leverage the transparency and immediacy of mobile technology to create platforms that help tap into this collaborative culture

### EXAMPLE: BMW DRIVENOW

We can communally consume just about everything: rooms through Airbnb, parking through Parkatmyhouse.com, Wi-Fi through Fon, everyday things through Zilok.com and rides through Uber, Lyft or Sidecar. Beyond these innovative new companies, existing brands have jumped into community consumption. BMW's car sharing scheme DriveNow uses these new consumption patterns, creating brand loyalty with consumers who might not (yet) afford a BMW. By signing up for a one-off fee and without monthly or annual fees, users can activate any DriveNow BMW near them with their DriveNow ID. Gas and charging are included and users can drop off their car at any DriveNow station. Even if they have their own BMW, not every car is suited for every occasion; car owners may just want to hop into a family SUV for the weekend away. It is also a good way of familiarising consumers with new products like electric cars. To make the experience maximally convenient, BMW has invested in smartphone technology and smart-parking apps. The BMW brand experience reaches a wider audience by tapping into community consumption.





# 4 PHOTOGRAPHIC TIMELINE SMART SHOWCASE OF SELF



Consumers photographically document their lives on social networks to express and build their identities. In search of 'real' experiences, photos have been instrumental in creating lasting impressions that can be collected and shared. The 'selfie' phenomenon marks a new era of self-expression: the focus is on marking one's self in a place and time, and sharing the proof with friends. However, in our eagerness to share our experiences, we have tended to mindlessly snap photos of everything, compromising on the realness of our experience. Now, more mindful, selective sharers and photographers are emerging. More attention goes to choosing what to eternalise and who to share with. The focus is on meaningful value exchange. As consumers rediscover the value of community and pursue a sense of belonging, sharing is now more exclusive. For instance, Instagram recently launched 'Instagram Direct', allowing users to share photos with specific relevant people. Ephemeral photo-sharing apps like Snapchat and Blink challenge the timelessness of photography, focusing more on self-expression. Their fleeting nature also reduces the pressure of having to send a perfect photogenic snap. As consumers are increasingly concerned by the consequences of carelessly digitalising their photographic self, they are looking to reclaim control, preferring exclusivity, anonymity and ephemerality.

## FACTS:

- Brand adoption of Instagram is projected to increase by 80% in one year

Source: Forbes (December 2013)

- Photos shared daily on Snapchat is expected to reach 500 million in 2014

Source: ZenithOptimedia

- WhatsApp has 400 million active users by end 2013. We project the number of active users to grow by 15% every month in 2014

Source: WhatsApp and ZenithOptimedia

## BRAND ACTIONS:

- Be aware of and leverage the different methods of photo sharing to facilitate consumer's storytelling
- Realise the importance of ephemeral content and selectivity. Using ephemeral sharing on a brand level could also promote exclusivity and create teasers to engage consumers
- Brands should behave more like the consumers. Share selectively and more intimately with consumers to build trust

## EXAMPLE: TACO BELL STORIES

Taco Bell is one of the first brands to embrace Snapchat as part of treating its customers as friends. Taco Bell informed its Twitter followers of its secret announcement of the return of the Beefy Crunch Burrito on Snapchat, making followers feel like VIPs thanks to the exclusive snap. The company also made the most of Snapchat's new feature, Snapchat Stories, which allows users to create 24-hour long narratives by stitching together fast-disappearing photos and videos. The fast food chain ran a series of eight photos and videos that told a story about a group of friends' journey to Taco Bell. The brand's followers also use the feature in a similar way to tell stories of their trips and adventures.





The user-friendly recordings features and apps available on mobile devices have generated significant numbers of individuals who create content beyond simple self-expression into broader sense of opinion, information sharing and even entertainment. These content producers and publishers produce content for the wider public, beyond their own social circle. We can expect social network sites to be prime talent-spotting ground, as shown by the rise of YouTube stars who command millions of views and enjoy the status of famous actors or pop stars. Their ability to relate to mainstream audiences, their raw talent and captivating stories are factors that draw people. Some of their content stands shoulder to shoulder with professionally produced news and entertainment. Rather than regard these talented individuals as competitors, like-minded talents and professional content producers are uniting to create content. The collaborative process is not only instrumental in inspiring artists, but helps extend their influence to their followers. In 2014, we can expect collaboration between individual content producers, mainstream content publishers and distributors and corporations to grow, as online video channels like YouTube and Vimeo have become forces to be reckoned with.

### FACTS:

- More than a million creators from over 30 countries around the world earn money from their YouTube videos

Source: YouTube

- If content gets going on social media, it can get as much as 34 times the traffic as on the original site

Source: BuzzFeed

- 17 films by Kickstarter creators premiered among the world's best and brightest in 2013 Sundance Film Festival. Six of the 17 films won awards and 11 were selected for distribution.

Source: Kickstarter

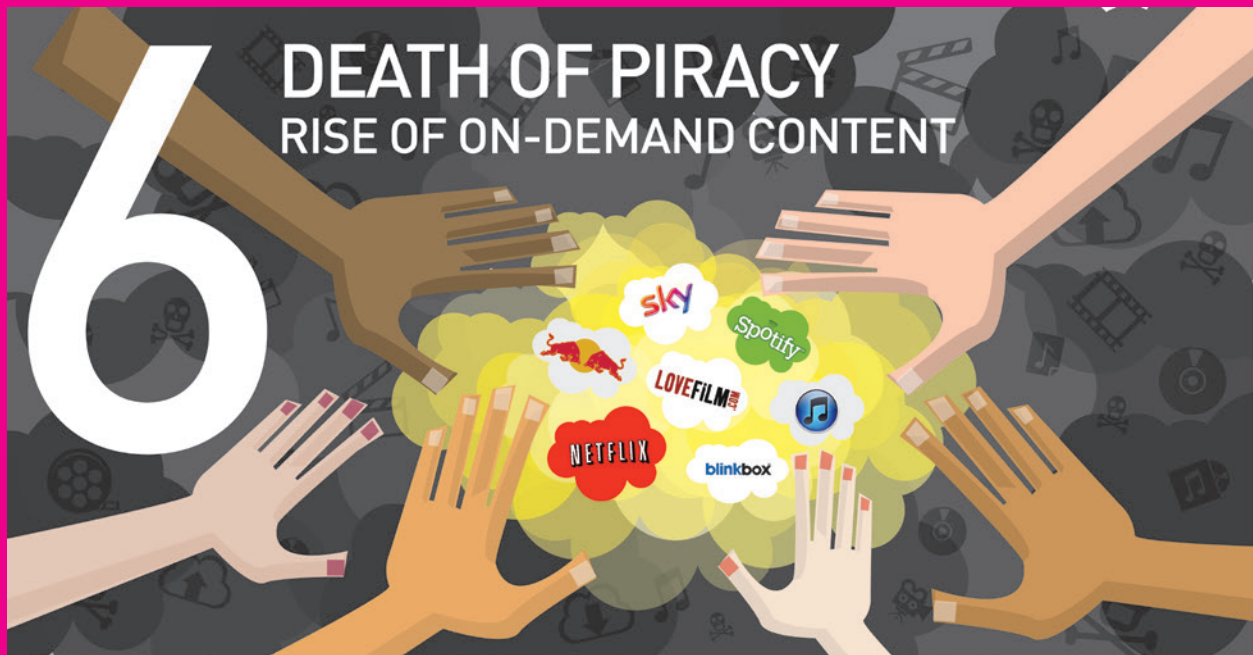
### BRAND ACTIONS:

- Identify the right talent (ideally with a significant number of followers) to support your brand story. Look to work with those who are genuinely interested in your brand, which will support your content and partnerships in the long-term
- Buy up or co-create content with independent content producers to build up your owned media assets while saving on production costs and time
- Make these influencers your spokespeople. Give them the flexibility to create content but ensure that there is a natural fit with your company and their audience's interest

### EXAMPLE: COKE "AHH EFFECT"

YouTube star Kurt Hugo Schneider and Coca-Cola have teamed up to create a pair of jaw-dropping music videos using Coke bottles and cans as musical instruments. The videos are part of the 'AHH Effect', an all-digital campaign exploring the happiness and refreshment of drinking an ice-cold Coke. For Coke, working with Schneider gave the brand the chance to tap into the YouTube star's audience. Schneider gave his first Coke video a shout-out on his personal YouTube account, where he has 3 million subscribers. Users spent an average of nearly 7 minutes on Schneider's page. The average time spent on the campaign's entries was a little more than 2 minutes.





Most consumers expect digital content to be free, which has meant trouble for creative industries that need to generate profits to invest in new content experiences. This situation is turning around. Content subscription is on the rise. Consumers want to fill their free time with quality entertainment. The thrill of being the first to know or experience something is more relevant today as the 'always on' lifestyle encourages people to keep up with everything. The chance to be part of creating content or jumping the queue for earlier access are things worth paying for. Savvy gamers are happy to pay for virtual equipment that gives them a competitive edge and people are willing to pay to test games before they are officially released. There's a shift from payment models that involve buying and owning content stored on a device, toward paying for the right to consume content on a rented basis, streamed across different devices. All these payment models may result in removing commercial breaks. Brands will need to find new and engaging ways to provide content experiences that people value and trust. Branded content that takes into account consumer needs, related to where the consumers are and what they're doing, is a great way to start driving deeper levels of engagement.

### FACTS:

- Those looking at pages with branded content were 41% more likely to express an intent to buy the brand versus those who saw a regular Web page with no branded content

Source: Forbes

- 70% of consumers say content marketing makes them feel closer to the sponsoring company

Source: Content Marketing Institute

- Consumers are 25% more likely to look at a native ad than at a banner and they look at them 53% more frequently

Source: CMO.com

### BRAND ACTIONS:

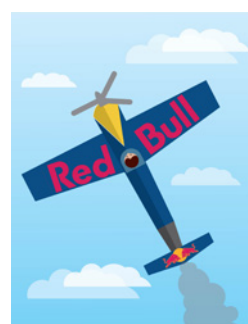
- Think like a publisher not an advertiser – be engaged in media across channels and formats
- Create conversations around the brand, not about the brand
- Think about continuous story-telling and operating in real-time

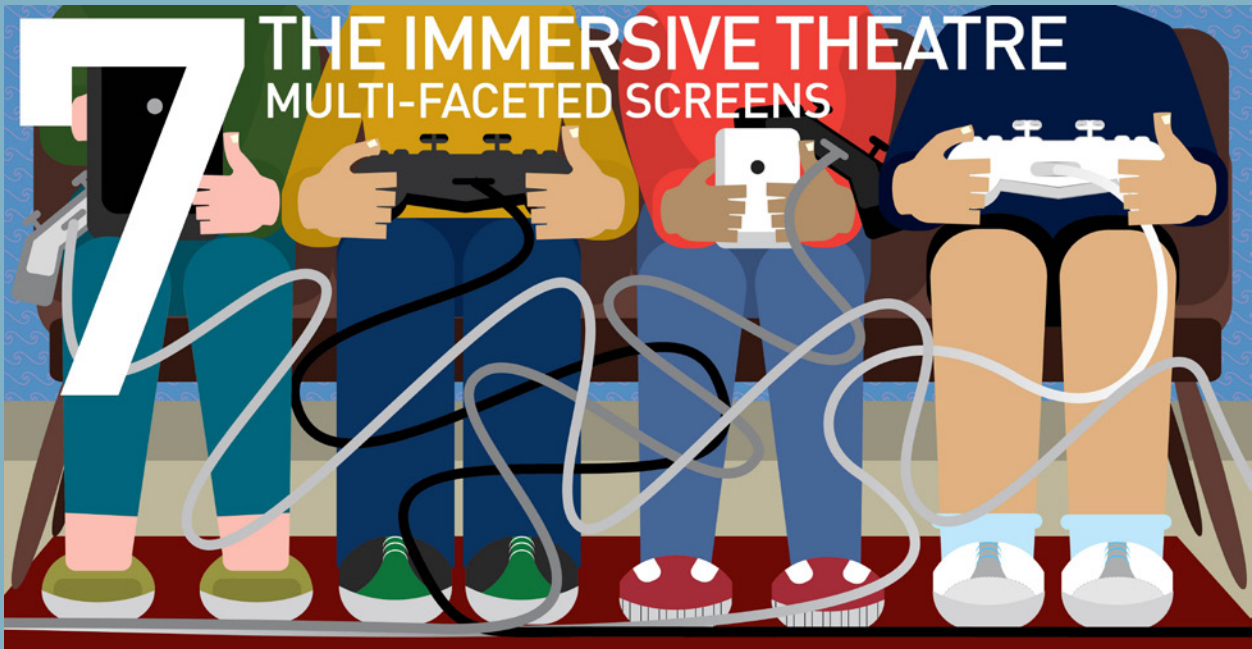
### EXAMPLE: THE RED BULL LIFESTYLE

Many content marketing experts hail Red Bull as the brand to emulate. With a standalone, 135-staff media company that publishes extensively across media channels, Red Bull has become a content producer that just happens to sell an energy drink. It produces mobile apps, print, web TV, web radio, newsfeeds, social networks, video and even a full length film, owning 900 domain names spread across 36 languages and a YouTube channel with 600 million views. There are many lessons from Red Bull:

1. Entertain first. The sales will come
2. Create conversations around the brand. No one wants to talk about a drink but they'll talk about music, share photos and embed videos
3. Monetise content. They license some of their images, sell their movie and charge you to read their magazine
4. Mobile is important. They have apps, games and platforms that work for all devices
5. Not just quality but also quantity. They are 'everywhere'

Red Bull knows that in order to get something valuable, a brand needs to give something valuable: don't be the ad, be the show.





The living room has become a stronghold for gaming, commerce and socialising. This is growing with the march of technology. The 'converged living room' is a trend that has taken off in recent years, driven by integrated easy-to-use interfaces that connect mobile devices to the TV screen and increases the popularity of online video streaming. Today, the living room is transforming into a live immersive theatre. People can enjoy content and create experiences on a big screen in their own home. They can decide to have a relaxing or action packed experience, or even both, as high-powered home entertainment devices like the Xbox One and PlayStation 4 come with new games, new forms of audience participation, rich social experiences and a suite of entertainment apps. Experience seekers will find themselves paired with the right player to compete with. Interactive gestures, real-time sharing their performances on social networks, matching their moods to the right music and the possibility of multi-tasking across multiple windows empowers them to immerse themselves and create deeper engagement with the content. For brands to play with their fans, they need to create the desirable atmosphere and experience by considering fans' moods and behaviour in the living room.

## FACTS:

- 97% video viewing happens right on the big screen

Source: Forbes

- 48% parents play computer games and video games with their children at least weekly

Source: Entertainment Software Rating Board

- 79% of TV viewers want to interact with televised programming

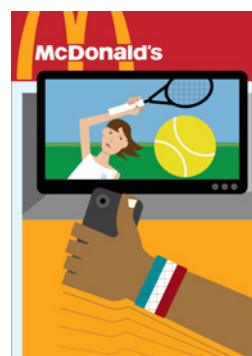
Source: Brightline

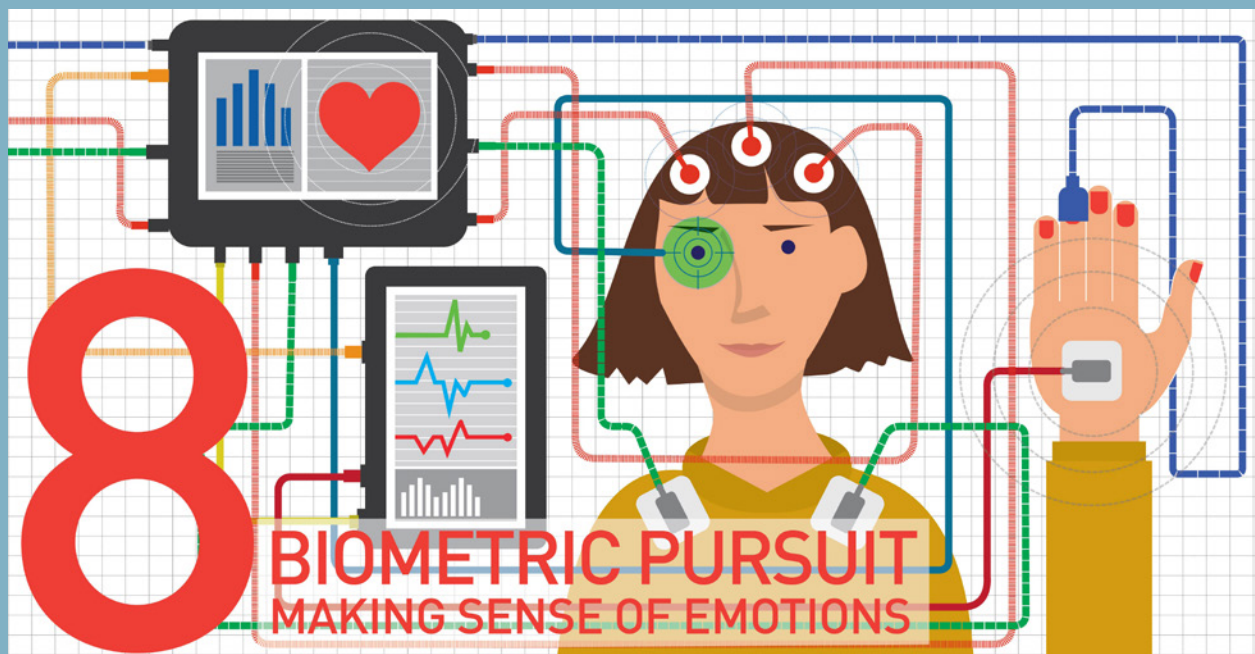
## BRAND ACTIONS:

- Conceive, develop and produce along a multi-screen strategy with content that optimises devices' capabilities and takes context and environment into consideration
- Weave together content across different touch points. Tie up loose ends, help consumers understand the complete brand story and provide them with an integrated user experience
- Make use of the different technologies available in mobile and home entertainment devices to create an immersive experience in the living room

## EXAMPLE: MC DONALD'S CUSTOMERS TURN REAL TIME ATHLETES

While Chinese consumers celebrated the 2008 Beijing Games, it was unclear how they would respond to the 2012 London Games. As a premier sponsor McDonald's, with 1,300 stores in China, needed to work out how to reignite the Olympic passion, to drive sales and stand out against rival KFC. McDonald's created a special 'taste of London' menu, promised 'champion' service and ran in-store events. TV screens showed live coverage of the Olympics around the clock. McDonald's developed an app that used GPS and motion-sensor technology to turn the in-store audience into athletes. By signing in to the app, guests could virtually participate in events, mimicking the actions of competitors on TV using their phones. Participants could bring their friends along and share their scores on Sina Weibo. In-app coupons closed the loop, encouraging purchases. Three million people downloaded the app, playing over 7.5 million games. 600,000 mentions on Sina Weibo fuelled vital word of mouth. The 4.5 million in-app coupons generated an estimated \$8.7 million.





2014 will see biometric technology moving into the mainstream. Biometric technology can sense even the subtlest nuances of our body language, with sensitivity we only expect from another human. Facial recognition, voice activation, eye tracking and various sensors to measure consumers' real-time emotional and physiological responses will be deployed to gauge consumer's emotional involvement. Quantifying real-time emotions marks a great leap in how we engage with consumers. Emotions act as gatekeepers and drivers of decision-making. It lands brands with the opportunity to match consumers' moods and behaviours with relevant content, just right for that moment. As the intimate interface between humans and machines, this technology will be a game changer in brands' interactions with consumers. The expanded range of feedback mechanisms can make experiences more immersive. Just as people wear their emotions on their sleeve, we believe brands that connect emotionally with consumers will gladly be shown off.

### BRAND ACTIONS:

- Consider tracking the minimum level of emotional engagement that has been attained by an ad and branded content
- Identify which biometric features that best serve the purpose of creating an immersive interactive experience for the audience
- Design real-time response mechanisms to deliver content in accordance with consumers' mood and behaviours

### EXAMPLE: BIOBEATS MAKE MUSIC FROM YOUR HEART

BioBeats creates a world where our apps and devices understand and adapt to the way we feel. It uses your iOS device to detect your heart rate, then generates custom music in any genre you choose. An example of how such technology could be used would be to play music that matched the pace of somebody running, and then slow down the music if they were running too fast. BioBeats is keen to experiment with user-engagement experiences. They collaborated on a concert with a LA-based hip hop act Far East Movement aiming to collect 1 million users' heartbeats using the Pulse iPhone app. During the event, live-streamed online, the band performed a tune called 'Turn Up the Love' while a video screen showed tallies of the heartbeats contributed by viewers worldwide. To further encourage users, the organizers said the event would be extended if the 1 million milestone was reached. BioBeats ended up collecting 1.64 million heartbeats. 'BioMuse', an app that creates playlists based on heart rates and breathing, finding music to fit your mood, will soon be released.





We have developed an aversion toward advertising. Who wants intrusive, loud and often annoying clips that disrupt our favourite series or film at suspenseful moments? Online advertising lacks popularity because of privacy concerns. However, change is in the air. We believe 2014 will be a year when ads get better as our mobile devices get to know us better than we know ourselves. The leap in big-data processing means our mobile devices can now monitor the world around us in real time. There is a huge surge in the use of apps that are fully capable of anticipating our daily needs, from weather predictions to updating our schedules based on public transportation delays. Google Now and apps like the Sherpa personal assistant have gone a step further, taking into account customers' past behaviour to predict their next move. Although push messaging is not new, these will become more intimate and less disruptive. In 2014, we will see an increasing number of brands move into intimate advertising, offering more subtle, value-rich content that the consumer actually desires. Brands using this as an advertising platform need to be reveal their true colours and selectively share aspirational stories with their audiences.

## FACTS:

- 90% of consumers find custom content useful and 78% believe that organisations providing custom content are interested in building good relationships with them

Source: TMG Custom Media

- 40% of consumers would rather see ads for products and services that reflect their interests than random or generic products and services

Source: Zogby

- While 70% of Millennials in the US agreed with the statement that 'No one should ever be allowed to have access to my personal data,' 56% said they would share their location with a nearby company in return for a relevant coupon or promotional deal

Source: USC Annenberg Center

## BRAND ACTIONS:

- Build trust and communicate with the audience about what you do and why. There should be clear benefits to them
- Create a personal voice. This makes the audience feel you know them on a personal level. In the beginning of the relationship, find out their needs
- Make your audience feel valued and ensure that you only serve up truly relevant content

## EXAMPLE: NIKE

In an effort to make its marketing less of an intrusion and more of an invitation, Nike has used 'predictive' mobile ads, tailored to a customer's exact location and social-media history. Nike's new Carmelo Anthony shoe targeted shoppers who followed New York Knicks players on Twitter or whose smartphones were GPS-tracked on hiking trails, running trails or tennis courts within the last month. When customers in Manhattan were within 100 steps of a Nike or Foot Locker store, a mobile ad popped up to direct them to the store. We can expect Nike to become a trailblazer for intimate, sensor-based advertising with the help of its activity-monitoring device, the Nike+ FuelBand. Nike unveiled a series of partnerships with startups that tap into FuelBand data, planning to turn its data mining venture into highly personalised marketing. The challenge is to make sure it feels like a service rather than stalking.





In 2013, we touched on how smartphone or tablet users are embracing a world where consumers can search beyond anything and buy (almost) anything at any given time. In 2014 and beyond, the high street will be converted to the i-street, where digital technology steps into the 'real' retail space. Wi-Fi is a game changer for retail. It allows shoppers to use their mobile devices in-store to research, find digital coupons and promotions and compare prices. Shoppers are encouraged to use their mobile check-in features to receive bonus points and special promotions. Across the board, shoppers who use mobiles actually spend more in stores (Source: Google Shopper Council). We believe the key to really owning the digital experience in-store requires the retail space to be a dramatic hub of exploration, interactivity and creativity that delights and surprise shoppers. By using biometric technology and customer's personal data, content can be curated according to shoppers' needs, interests and mood. Being entertained and made to feel the store knows you are motivations to return to the store.

## FACTS:

- 84% of smartphone shoppers use their phones while in a physical store

Source: Google Shopper

- 80% of smartphone owners want more mobile-optimised product information while they are shopping in stores

Source: Moosylvania 2013

- 1 in 3 smartphone shoppers would rather find information using their smartphone than ask a store employee

Source: Google Shopper

## BRAND ACTIONS:

- Capitalise on creating an immersive ambience that appeals to all senses, today's mobile savvy culture and values customers' time
- Understand when and how to harness new technologies, providing a truly personalised service which encourages shoppers to explore and enjoy the brand
- Effectively leverage shopper data to understand, predict, and note changes in, purchase behaviour. Deliver meaningful content based on that data to shoppers during the decision journey

## EXAMPLE: BURBERRY.COM IN THE PHYSICAL STORE

Burberry made the decision to do the exact opposite of how people usually build physical spaces, designing the Burberry flagship store on Regent Street to evoke the same feelings in customers as the online store does. They installed several hundred speakers and built a stage, as well as an in-and-out satellite link to stream in live shows, and stream out live gigs; all of which emulates the Burberry Acoustic site. They also installed residential seating around the space, to mimic how people would sit and relax at home with their laptop or iPad. Customers can experience different sorts of entertainment in-store. For example, there are hundreds of screens in the store, with content specifically designed for the environment they're in. They also strive to share the brand story and stories behind the specific products. RFID technology allows the person trying on a trench coat to approach the mirror and find out how the coat was made and what it would have looked like on the runway.



# SUMMARY

The 2014 Top Ten Trends go a long way toward fulfilling consumers' appetites for meaningful experiences that help them define and express themselves. In a world of short attention spans, people's need to push themselves to stand out continues to grow. Associating with certain lifestyle says a lot about someone. In 2014, we expect these consumers to continue their missions of self-improvement. They will turn to technology, brands, products and services to help them drive real and positive changes and reward them for their success. They value a sense of community; it not only gives them a shared identity but spurs them to change and collaborate on surprising initiatives that transform their lives and their local communities. Brands need take positive actions that support the community and satisfy consumers' need to co-create or share.

The need for self-expression also compels consumers to create unique stories and showcase their talents. From posting photos to creating content, they are interested in showcasing their stories about their interests and new experiences that are the envy of their friends. In 2014, we can expect people to be more spontaneous and in search of more fluid forms of digital sharing, similar to their real social interaction. Brands need to understand consumers' time frames, how they build the digital time capsules they share with their consumers. With ever more people creating quality content and commanding their own followers, we believe the time is here for brands to take these talents seriously and think of how to work with existing talent to convey brand stories, cross-promoting content to each other's followers.

Choice-saturated and time-limited consumers want to cram a lot of content and experiences into every minute. In 2014, their demand for quality content and experience will be even greater. The latest mobile devices, in-home entertainment and biometric features set the expectation for personalization. Consumers will expect their needs for information, connection, assistance and more to be met even before they ask. The breach of privacy is tolerated if brands add value and offer meaningful value exchanges. Their expectations cross into the physical world where they prefer

customised shopping experiences and expect in-store experience to delight them. Brands will need to be truly helpful throughout the consumer pathways, facilitating their decisions. Applying the mindset to serve, provide convenience, personalisation and most importantly, helping consumers tell their story, is the way forward in 2014.



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