

THE STATE OF PLAY

25 reasons engaging your customers will never be the same

We **play** in public. We **play** in private. We **play** online, offline and waiting in line. We **play** in stadiums. We **play** at home. We **play** on alien worlds. We work to **play**. You **play** at work and that's OK. We **play** to win. We pay for skins. We **play** to learn. We pay to watch. We **play** with *your competition*. We **play** on dates. We date to find playmates. We **play** on good teams. We **play** with bad sports. We **play** to keep fit. We cos**play**. We **play** new games and ancient sports. We **play** till the end. And maybe after!

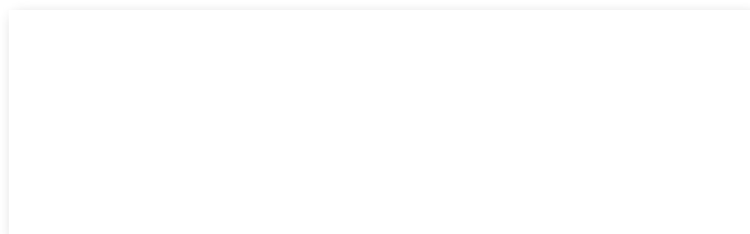
Play is a serious matter.

Play is a deeply held human desire. Changing behaviors, new tools, and emerging expectations related to having a good time impact all of you. Whether you work for Asia's busiest airport, design apparel for Adidas, or run your own small business: play should be on your radar.

Here we will look at 25 global innovations that are delighting consumers *today*. Your mission: use them to inspire your own efforts to delight the customer of *tomorrow*!

🚩 *Heads up: We built this report as a FREE slide deck (complete with charts, additional insights and a lot of adorable animations) to use with your team. So, before you scroll any further, if you are on desktop we highly recommend viewing that version. You deserve it. For you early adopters reading on mobile (!), this simplified text version is for you.* 🚩

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6 reasons play is a major business opportunity.

This isn't a spectator sport. Serious fortunes will be made by those who focus on play. Here are some CFO-pleasing stats for you:

1. Spending on play is growing.

Pick your market. Global consumer spend on gaming will grow to \$180 billion by 2021, an annual growth rate of 10% from 2017 and 2021. (Newzoo, April 2018). Global revenue in the Sports & Outdoor segment is expected to show an annual growth rate of 10% from 2018 to 2022. (Statista, June 2018). Toy sales in Asia have grown by 21% in the last five years. The global toy market is forecasted to reach \$99 billion in 2022 (NPD, August 2018).

2. Play can break through to saturated audiences.

You don't need to be Reed Hastings to know competition for consumer attention is higher than ever before. American adults spend over 11 hours per day listening to, watching, reading or generally interacting with media (Nielsen, July 2018). Brands that offer rich, playful experiences are more likely to engage with users than those hammering one-way comms.

3. In an aging world, play isn't just for kids.

Society's widespread agreement on the importance of play in childhood development is recent history. But far more recently, another play-related consensus is emerging. With a global aging population, play (from **Super Mario** to **Mahjong**) and social connections will play an urgent role in reducing loneliness, depression and potentially dementia for millions of older consumers.

4. In anxious markets, consumers crave escapism.

Play is a powerful form of escapism. A recent survey found an average of 56% of people in 28 nations feel their country is on the wrong track (Ipsos, July 2018). When a majority of your market is worried about polarized politics, the environment, trade wars, cyber crime, technological displacement and more, they are crying out for a happy distraction. And 44% of gamers say the biggest benefit is improved emotional well-being (Qutee, June 2018).

5. In booming economies, stressed-out citizens also need escapism!

Even in optimistic markets like China, where 91% are happy with the direction the country is headed in, citizens aren't taking it easy. Societies that experience miraculous economic transformation often place soaring expectations on the next generation to continue the trajectory. The average length of sleep for Chinese people has dropped from 8.8 hours in 2013, to 6.5 in 2018 (Caijing, July 2018).

6. Play leads to happier employees. Happier employees lead to happier consumers.

As we outlined in **GLASS BOX BRANDS**: in an era of radical transparency,

your internal culture *is* your brand. The wellbeing and engagement of your staff is more visible to consumers than ever before. There are fundamentals to get right (pay, purpose and parental leave) before you try to boost morale with play, but it's a powerful tool. See how Amazon was able to harness its playful (**dog-friendly**) culture in a way that softened the blow of Prime Day chaos!

Time to level up your play!

But enough data and theory, let's get on with bringing you 25 innovations that perfectly capture today's State of Play.



2019 TREND EVENT

Our first series of 2019 trend events will take place in Amsterdam, London, New York, and Singapore.

This time we'll be exploring The Future of Experiences, specifically in-person experiences and the consumer trends placing them at the center of B2C brand and marketing strategies worldwide.

[Find out more here](#)

THE ESPORTS ECONOMY

We feel your pain. It's 2018 and there are many professionals who still haven't absorbed the global dominance of esports in popular culture. With or without them, a thriving new economy continues to evolve.

Examples



ADADA & CHINA - MYESPORTS VENTURES — Purpose-built esports stadiums under development
August 2018 saw Myesports Ventures unveil plans for a stadium dedicated to esports in Canada. Similar to traditional sports arenas, the Gaming Stadium will seat 10,000 spectators and feature 40 gaming stations, live streaming facilities and food and beverage outlets. The stadium is set to open in 2019. The world's first purpose-built esports stadium (still under development) is based in Chongqing, China.

US - WARD — App allows fantasy predictions on esports games
A US-created app launched in June 2018 allowing fantasy esports fans to make predictions about games in real time. Ward users predict their version of in-game events to win prizes such as headphones, tickets for championships and signed merchandise such as team jerseys. The initiative launched following USD 600,000 seed investment from backers Impulse VC, SmartHub and a number of European angel investors.

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PLAYFUL PUBLIC SPACES

There's no reason to limit fantastical play to online spaces. Especially when even teens are working to cut down screentime (Pew). Trigger delight by bringing playful moments into surprising locations IRL.

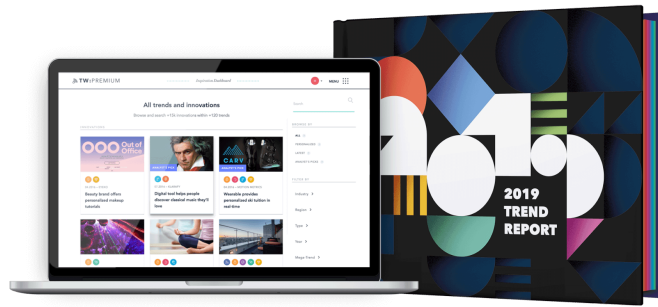
Examples



SINGAPORE - CHANGI AIRPORT – Airport introduces animatronic butterflies and five-story playground
Singapore's Changi Airport debuted its Luck is Everywhere campaign in July 2018, promoting its 'Be a Changi Millionaire' shopping giveaway. The campaign saw animatronic, remote-controlled butterflies released into the airport. The butterflies were made to replicate the *Diaethria Anna* species, which naturally has an '88' design on its wing; the number eight is a symbol of luck and prosperity in Asia. Then in August, Changi Airport made Chandelier, a five-story-high playground, open to the public. The woven playground features climbing nets and a pole to slide down. It can be used by up to 50 people at a time, for free, at any time of day.

DENMARK - FOKSTROT – Artificial urban islands function as public spaces
Denmark-based design studio Fokstrot released a prototype for artificial 'islands', to be placed in the Copenhagen harbor as a public space, in Q1 2018. The Copenhagen Islands project will see the wooden platforms function as a resting spot and park for swimmers and kayakers; the islands will be connected to one another, forming a 'parkipelago', for special events. The project's islands are set to include a stage, mussel farm, sauna and diving board.

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PREMIUM SERVICE

Consumer-focused professionals from adidas, Netflix, Nissan, Virgin, Samsung, Sephora, ING, Orange, Fujitsu, Spotify and many, many more have gained 2019 access to our Premium Service.

In the coming weeks and months, they'll be using the platform to ensure their plans remain deeply aligned with what their customers want next.

[Find out more here](#)

INSTA-MONUMENTS

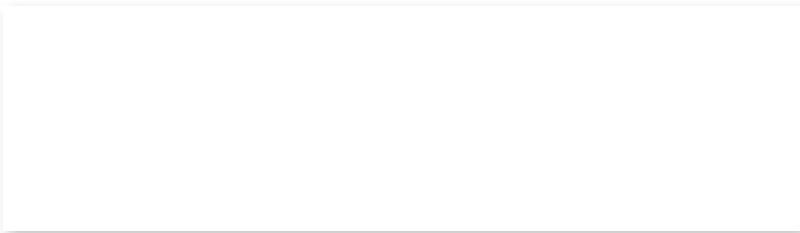
The following examples capture the desire for escapism with towering clarity. They have an immediate local impact, jolting urban passersby from their newsfeeds. Of course, these playful installations were born for Instagram stories.

Examples



<p>KOREA - KAWS – Artist creates 28-meter floating sculpture</p> <p>July 2018 saw American artist KAWS unveil KAWS:HOLIDAY in Seoul’s Seokchon Lake. The exhibit, which was produced collaboration with Hong Kong-based creative studio AllRightsReserved, includes a 28-meter inflatable floating sculpture. Accompanying KAWS:HOLIDAY was a range of limited edition merchandise, such as a scaled-down rubber bath toy based on the floating sculpture.</p>	<p>UK - NOW TV – Giant statue of Jeff Goldblum appears in London</p> <p>Marking the 25th anniversary of Jurassic Park, a 25ft (7.6m) statue of Hollywood actor Jeff Goldblum made a brief appearance next to London's Tower Bridge in July 2018. Mimicking a pose Goldblum made famous in his role as Dr Ian Malcolm in the 1993 movie, the effigy was created by Sky's on-demand entertainment provider, Now TV. The statue weighed 331 pounds (150 kilograms) and took more than six weeks to build.</p>	<p>CHINA - LIEP</p> <p>tallest artif</p> <p>July 2018 s</p> <p>made wate</p> <p>southwest</p> <p>Plaza stanc</p> <p>off the tow</p> <p>water, and</p> <p>of prep wc</p> <p>electricity.</p> <p>on for spe</p>
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PURPOSEFUL PLAY

To set themselves apart from doom and gloom pessimism, purpose-driven brands are combining three of the biggest mega-trends of the last 30 years: the Experience Economy, Gamification and Purposeful Consumerism.

Examples



SWEDEN - BJÖRN BORG – Brand uses AR to raise awareness of LGBT rights

June 2018 saw Swedish underwear brand Björn Borg launch a campaign during the FIFA World Cup to raise awareness of LGBTQ rights. During the tournament's opening match (Russia versus Saudi Arabia), fans were encouraged to visit an online platform and place an augmented reality image of a gay couple kissing above the crowd with the tagline 'Love will Win Tonight'. Images could be viewed via mobile or laptop and could be shared across social media. In Saudi Arabia, homosexuality is an offence punishable by death, while Russia's LGBT policies have been widely criticized.

MEXICO - MINECRAFT – Gamers help rebuild reefs with in-game creations

Minecraft launched the Coral Crafters coral-rebuilding campaign in Mexico in time for June 2018's World Ocean Day. The campaign saw Minecraft ask players – including YouTube influencer StacyPlays – to design sculptures for new coral that would be built in real life using Biorock (which accelerates natural coral growth). In addition to building the structures, the game released a special in-game expansion, with proceeds from purchases going to The Nature Conservancy. Minecraft pledged to donate USD 100,000 to the same nonprofit once players had placed 10 million coral blocks underwater in Minecraft.

BRAZIL - CALVIN KLEIN – Brand's digital campaign

June 2018 saw Calvin Klein launch a digital campaign for its São Paulo store. The campaign coincided with the 50th anniversary of the brand's first rainbow flag and featured a series of LGBT characters.

EMOTIONAL EXPERIENCES

Online lifestyles embedded a participatory mindset (connect, interact, and co-create) in billions of consumers. Ten years ago **we warned you**: consumers will take their online expectations offline. Yet, new experiences take this a step further and interact, adapt and respond based off of participants' emotions.

Examples



CANADA - MONTREAL JAZZ FESTIVAL – Festival's brand identity captures concertgoers' data
In April 2018, the Montreal Jazz Festival debuted a new brand identity – a visual representation of data captured from concertgoers. The organizer hosted an event in 2017 where sensors around the venue collected information related to attendees' five senses. The collective body temperature, foot stomping, cheers, and beer purchases of the crowd were captured, and the festival's new designs and marketing materials were generated from the resulting data.

UK - KEATON HENSON – Audience's emotional responses control concert lighting
In July 2018, English musician Keaton Henson performed Six Lethargies, an interactive composition at the Barbican in London. During the live performance, several audience members were monitored with biometric sensors, which monitored their nervous – and emotional – reaction to the music. The data produced controlled the lighting system at the concert. The artist hoped to capture how, through his music, his own feelings of anxiety and depression could be felt by the audience.

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ACCESSIBLE PLAY



Many categories of play remain exclusive or inaccessible in a way that is out of whack with modern expectations. Play should NOT be a luxury. Can you create inclusive moments of play for excluded or underserved audiences?

examples



US - MICROSOFT – Packaging for disability-friendly games controller gets easy-to-open design
July 2018 saw the unveiling of the Xbox Adaptive Controller's easy-to-open packaging. The accessible design allows the packaging to be pulled apart with the

FRANCE - UBISOFT – Video game players instantly banished for racist chat
July 2018 saw French video game publisher Ubisoft taking decisive action against racist trolls in its video game, Rainbow Six: Siege. Players using specific words in game, Rair

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user's teeth, making it easier for gamers with limited mobility to open. First announced by Microsoft in May 2018, the controller is specially designed for gamers with disabilities, and retails at USD 99.99.

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PLAY TO ADULT



One of our five trends for 2018, **ASSISTED DEVELOPMENT**, is where brands help young consumers to overcome hurdles, learn life skills and become 'adults'. While making a game out of paying off debt isn't right for every brand, who says play can't have a life-changing impact?

Examples



US - TRUTV – Game show's contestants compete to have student debt eliminated

July 2018 saw TruTV's comedy game show, Paid Off, premiere in the US. Each episode of Paid Off features three contestants with student loans, who discuss the impact their debt has had on them. Designed to highlight the gravity and absurdity of America's student debt issue, the show's contestants must answer trivia questions to earn cash. Although there is only one winner per episode, every contestant earns some money to help with their debt.

US - WINWIN – App helps players save while having the thrill of a lottery

Available to download from February 2018, WinWin is an app that encourages regular saving habits by offering users the chance to win cash prizes. Every dollar users save counts as a 'lottery ticket' towards winning up to USD 1,000 each week. Furthermore, users can play a short one-minute daily game (like whack-a-mole or word finder), for a chance to win instant cash prizes, with the prizes available increasing as users build their savings balances. Users' funds are held in a FDIC-insured Wells Fargo account and WinWin costs USD 2 per month.

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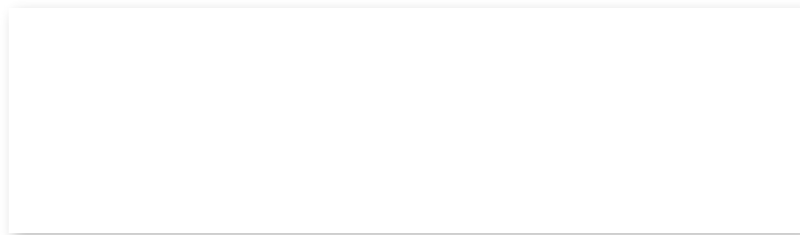
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The challenge, should you choose to accept it!

We created a slideshow and worksheet for you because we REALLY want you and your team to get together (if your CFO is sold on the serious business of play, head to Changi Airport!) and start brainstorming new ways to play and delight your customers. Print off the worksheet, fire up the Google slides version of this and Go! Go! Go!

Advanced rules.

(aka, a note to our hardcore readers)









Yes, we know there aren't any new trends with a capital 'T' in this issue. Rules are made to be broken! And eagle-eyed readers will notice many of these innovations are the playful take on trends we've written about previously. Don't worry, we still love trends.

ABOUT THE AUTHOR:

Reinier

IT TAKES A TEAM

This Trend Briefing has many hands on it. A huge thanks to the team that pulled this together with such positivity and enthusiasm, especially: Vicky Kim and Nikki Ritmeijer (for design!), and also Maxwell Luthy, Vicki Loomes, Henry Mason, Alida Urban, Harry Metzger, Harvey Gomez, Jareth Ashbrook, Jonathan Herbst, Lisa Feierstein, and Tash Cohen. THANK YOU!

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