

GLOBAL BRAND LAB REPORT

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four



Our brand lab report is compiled by Four's team of retail and lifestyle experts and analyses some of the latest innovations, experimental campaigns and transformative developments, which are keeping iconic destinations, retail and lifestyle brands alive for consumers on a global scale. We also explore how consumer behaviour is changing - now and forever - and how brands are evolving to succeed during this evolutionary time.

Images on this page and the cover are of Sydney, Australia, our destination spotlight this month. See page 7 to find out more.

FASHION & LIFESTYLE

THE EVOLUTION OF FESTIVAL FASHION AND THE 2024 MET GALA THEME



Coachella is having a fashion identity crisis

Vanessa Hudgens' absence from Coachella this year marked a significant shift in the festival's fashion landscape. Coachella 2024 witnessed a division between traditional "festival fashion" and a more nonchalant approach. While some attendees embraced casual attire, others stuck to the classic Coachella aesthetic. This split reflects a broader trend in fashion, with some prioritising effortless over traditional festival attire. The evolution of Coachella fashion can be traced back to the mid-2010s, influenced by Instagram celebrity culture. As A-listers distance themselves from influencers, festival-goers are faced with a choice between embracing traditional Coachella style or adopting a more laid-back approach.

What the Met Gala's 'Sleeping Beauties' theme really means

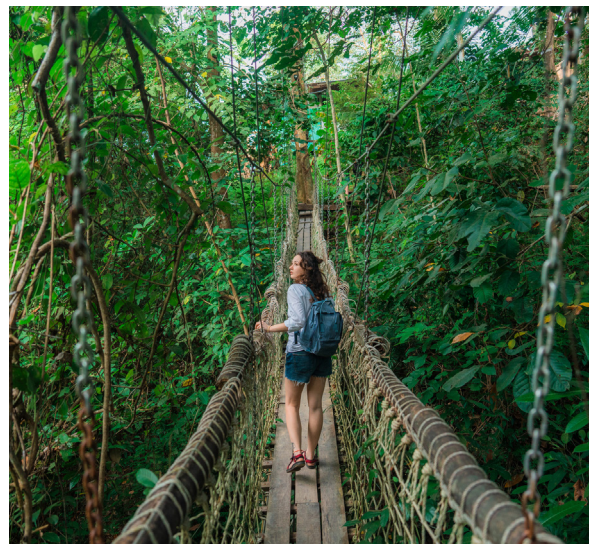
The Met Gala themes often convey distinct concepts, from honouring designers like Karl Lagerfeld to exploring cultural intersections like religion and fashion. This year's theme, "Sleeping Beauties: Reawakening Fashion", delves into the preservation of historic fashion and the role of conservators in maintaining these artifacts. While initially evoking princess gowns, the theme focuses on the delicate process of conserving and presenting garments as time capsules. The Met aims to not only exhibit these historic dresses but also to immerse visitors in their original context through AI and CGI technologies.

SOCIAL MEDIA TRENDS

PINTEREST SUMMER INSIGHTS, COACHELLA CAMPAIGN, TIKTOK'S NEW PHOTO APP

Pinterest shares insights into summer travel trends

Pinterest provides valuable insights into emerging travel trends as warmer months approach in the U.S., highlighting a significant interest in adventure travel, quiet getaways, and road trips, with searches for related topics such as “travel vision board” and “packing guide” experiencing notable increases. Marketers can capitalise on these trends, including a growing fascination with mysterious destinations and destination-related lifestyle topics, to tailor holiday marketing strategies on Pinterest and meet the evolving interests of potential travellers.



Coachella marketing is over - only for millennials

Ticket sales may be down, but some brands still bet big on Coachella last weekend, which is now about driving engagement with Gen Z. Guess went all out at Coachella, flying in 47 top influencers, including Coachella performers and YouTube stars, to their luxury compound to promote their new Guess jeans line. The influencers flooded social media platforms with content, driving boosted brand awareness and establishing long-term ambassadors for Guess. While some question Coachella's allure, brands like Guess are tapping into its Gen Z audience, alongside Pinterest, YouTube, and American Express, to reach younger demographics and drive social media engagement.



TikTok launches notes photo app in Australia and Canada

TikTok has officially launched “TikTok Notes,” a dedicated photo-sharing app similar to Pinterest and its previous eCommerce app, “Lemon8”, featuring a staggered tile display of images and a maximum of 34 images per post, aiming to expand its offerings and potentially tap into new opportunities in western markets, despite uncertainties about its appeal compared to existing platforms like Instagram. Though its success remains uncertain, TikTok is experimenting with new formats to broaden its reach and provide creators with new outlets for engagement.

CONSUMER TRENDS, CAMPAIGNS & BRAND ACTIVITY

ROCKSTAR X LIVE NATION, SPORT BEACH 2024 AND SOBERCHELLA



Rockstar energy drink and Live Nation have partnered for multi-year engagement at major UK festivals, targeting Gen Z with a fan-centric approach and strategic collaboration. Their plan emphasises on deep fan engagement throughout the festival journey, aiming to understand and meet audience needs while fostering a long-term music conversation.



Stagwell's Sport Beach returns to Cannes Lions 2024, featuring icons like Megan Rapinoe, Sue Bird, and Carmelo Anthony, offering curated programming tracks exploring sports' impact on business and culture, alongside brand partners like Clio Sports and Genius Sports, highlighting the convergence of sports and innovation on a global stage.



The U.S festival has expanded its non-alcoholic offerings with mocktail parties and euphoric alternatives, catering to sober and sober-curious attendees. Partnering with brands like The New Bar, the immersive experience features retro-themed bars offering non-alcoholic margaritas and cosmopolitans, reflecting a growing trend towards health-conscious festival experiences.

INFLUENCERS & KOLS

ONES TO WATCH



82K Instagram Followers

UK festival guru Tiger Lily has the ultimate inspiration page for all things summer celebrations. A mix of fashion, lifestyle and life hacks, Tiger Lily's content centres around UK and wider international festivals with her following rapidly increasing in the lead up to summer.



103K Instagram Followers

Mika is a wellness influencer with a passion for fashion and festivals. Through more contemporary looks and self care content, Mika showcases lesser known wellness festivals throughout the world which sets her apart from the glamorous festival content we're used to.

DESTINATION SPOTLIGHT

SYDNEY, AUSTRALIA



Vivid Sydney is an annual celebration of creativity, innovation and technology, which transforms Sydney for 23 days and nights. In 2024, for its 14th year, Vivid Sydney will fuse art, innovation and technology in collaboration with some of the most boundary-pushing artists, musicians, thinkers and culinary experts of our time.

Taking place through 24 May – 15 June 2024, there will be a program of light, music, ideas and food, united by this year's artistic direction, "Vivid Sydney, Humanity".

Alongside the illuminating art installations and 3D light projections – visitors are invited to immerse themselves in thought-provoking experiences and heartfelt discussions led by inspiring minds and free-thinkers addressing the big questions.



ARTS & CULTURE

GLOBAL EVENTS AND FESTIVALS

Hay Festival Global, Wales

There is a quaint market town called Hay-on-Wye in Bannau Brycheiniog in South Wales that is known as the 'book town' of Wales. Every May this book town hosts The Hay Festival Global bringing together diverse voices from the worlds of art, literature, science, politics, music and comedy to listen, talk, debate and create. In a unique location, with forums, digital platforms and learning programmes, the festival celebrates and inspires different views, perspectives and points of view. Fondly known as the 'Woodstock of the Minds', bookworms, authors, professors and more flock here to listen to speakers, get news on book releases, take part in workshops and broaden their horizons.



Cannes International Film Festival, France

The annual Cannes Film Festival spans 12 days, showcasing films and documentaries worldwide. It's an essential destination for film enthusiasts and those intrigued by diverse cultures. The famed opening ceremony features a star-studded red carpet, offering glimpses of beloved celebrities. For an opportunity to mingle with Hollywood's elite (and if budget permits), the Cannes Film Festival is a must-attend event. It's considered to be one of the best top 10 festivals around the world.



Bergen International Festival, Norway

Attracting over 100,000 visitors each year, The Bergen International Festival is held annually in Bergen, Norway and is firmly established in the northern European arts scene. 400 events are hosted at over 70 different venues and present art in all its guises including music, theatre, dance, opera and visual art. Bergen International Festival is Scandinavia's largest and most important festivals with a festival programme created with something for every taste and occasion. The events are organised under the three terms Festivities, Foundations and Friction.



CONSUMER FINANCIAL PLANNING TRENDS

AMERICAN EXPRESS'S NEWSTALGIC ACTIVATION, MASTERCARD UK EXPERIENCE REPORT



American Express's newstalgic activation

Recognising that Gen Z and millennials are the driving force behind Coachella's cultural zeitgeist (and new Amex cardmember applications), the payment card specialist tailored their activation to cater to their thirst for authentic nostalgia. Inside their "newstalgic" space, fest-goers were transported back to the Y2K era with a photo lab and emporium filled with ready-to-rent, eco-friendly digital cameras from Paper Shoot.

UK's experience economy set to spring forward

In a year when major events are arriving in the UK including global artist music tours and the Champions League final, Mastercard has revealed that 50% of British consumers are set to spend more on experiences this year compared to 2023, in new research that unpacks key trends shaping the UK and European 'Experience Economy' in 2024:

- 50% of British consumers are set to spend more on experiences this year compared to 2023
- Four in five (80%) said spending on experiences is usually, or always, worth it
- 40% said that how 'one of a kind' an experience is would be a determining factor in spending
- Data from the Mastercard Economic Institute reveals that the share of spending on experiences such as travel or dining out across Europe increased in 2023 to 22% of total spending, from 19% in 2019
- Brits' top priorities include travel, food and live music



FESTIVALS



In 2023, a total of **1.3 million of festival ticket sales** were recorded. More than **two thirds of festival goers** prioritised **visiting** more than **one festival** in 2023, confirming their love for this kind of event throughout the year. This suggests there are continuous opportunities to tap into a huge audience market.

According to *Mintel's Music and Concerts* report, new **experiences with virtual / augmented reality** and **music in the metaverse** is popular.

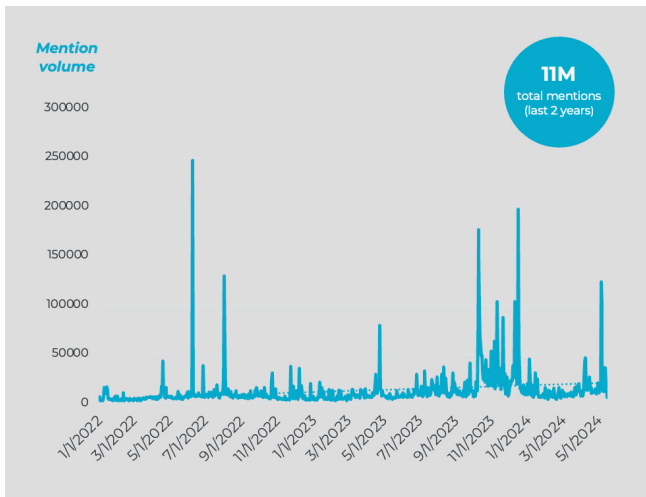
Total of **11M online mentions** around food, music, craft, festivals in the last 2 years globally

Nearly **80% of millennials** believe attending live events helps them **'feel more connected to others, their community, and the world'**

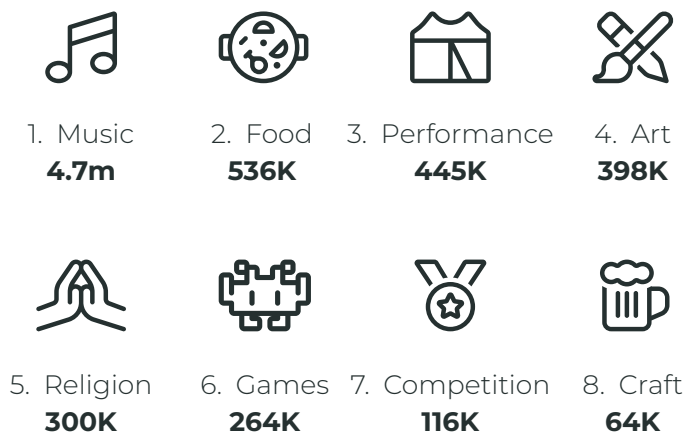
USA and **UK** lead the way in the amount of people **speaking about festivals** online

Online mentions of festivals peak in summer and winter; with music and food events leading the way

Online global mentions of festivals in 2023



Types of festivals ranked by volume of mentions



Source: Brandwatch; Mintel, Nielsen, The Youth Lab, Skiddle
Source: Mapper360®

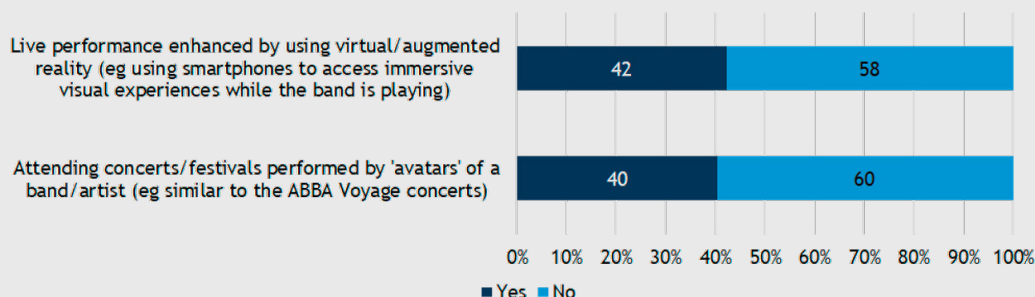
FESTIVALS: MUSIC

With the current economic squeeze, people are likely to be more selective with events; but a growing interest in the use of tech in live events is also visible

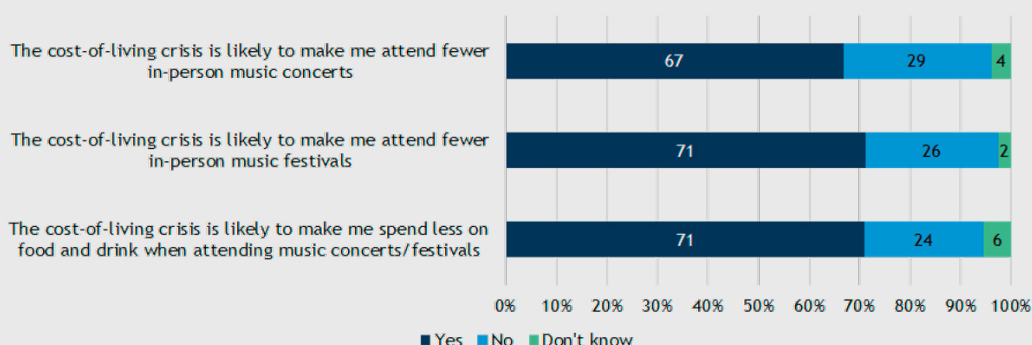
Nearly a **quarter of respondents attended a music festival in-person** during the 12 months ending April 2023. However, event-goers are likely to pick and **choose more carefully**, prioritising one or two events and reducing spend wherever possible.

'Hybrid' events will increasingly become the norm. Additionally, 42% of concert / festival goers, peaking amongst 57% of those aged 16 - 34, interested in attending **live performances enhanced by using virtual / augmented reality**.

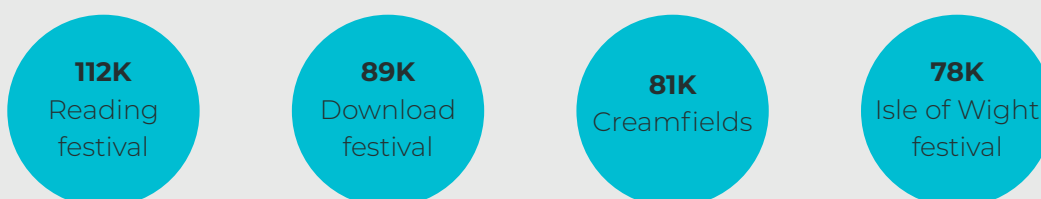
Interest in the use of technology to enhance live music concerts / festivals, 2023
"Thinking about music concerts / festivals, are you interested in the following?"



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Search volume around use of technology to enhance live music concerts / festivals, 2023



Mintel Music Concerts and Festivals. 600 internet users aged 16+ who paid to attend an in-person music concert / festival in the UK in the last 12 months and plan to attend a music concert / festival in-person in the UK in the next 12 months

FESTIVALS: FOOD

Food festivals are also popular, especially attracting outgoing and adventurous young consumers



Visitors of the "Foodie Festival"
"I love to try new foods, drinks, and recipes"



Male

Aged
35 - 44



West Midlands
& Wales

PERSONALITY



Perky



Agreeable

HOBBIES & INTERESTS



Travel & holidays



Exercising outdoors

536K

Online global searches for 'food festival'

6.6K

TikTok UK searches for 'food festival'

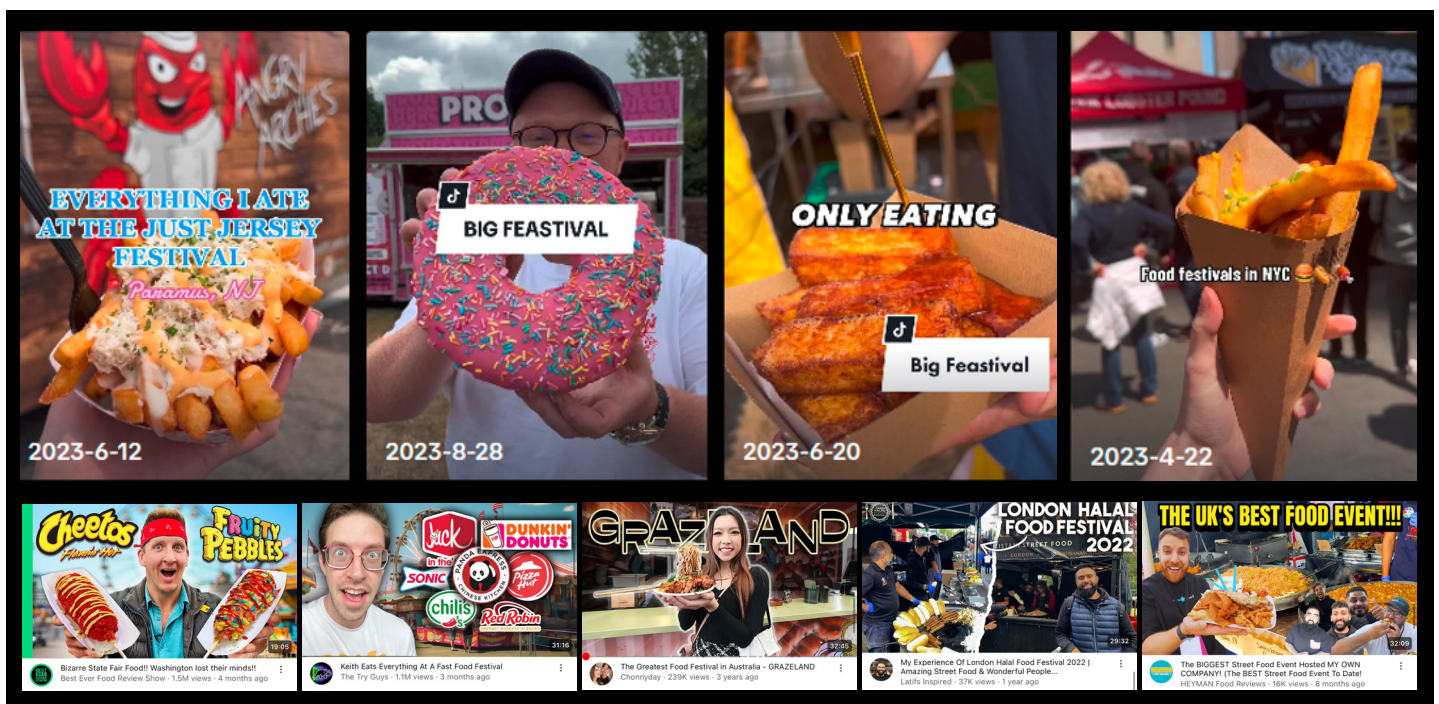
536

Google UK searches for 'food festival'

313

Bing UK searches for 'food festival'

Foodie festivals content on social media



Source: Mapper360@ YouGov



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