dentsu

DENTSU CREATIVE TRENDS 2022:

NEW WORLDS ORDER

"THE FUTURE OF CREATIVITY IS COLLABORATIVE CREATIVITY. WHAT WE SEE IN THIS REPORT ARE THE INCREDIBLE EXPERIENCES THAT CAN HAPPEN WHEN PEOPLE COME TOGETHER IN NEW WAYS TO FORM COLLECTIVES, COLLABORATE AND CO-CREATE.

THIS IS RESULTING IN AMAZING ALLIANCES ON NEW PLATFORMS THAT WE COULDN'T HAVE IMAGINED JUST A FEW YEARS AGO, CREATING THINGS THAT HAVE NEVER BEEN SEEN BEFORE. THE WORLD HAS CHANGED, AND CENTRES OF GRAVITY ARE SHIFTING.

THE FUTURE WILL BELONG TO THE BEST CONNECTED AND MOST AGILE, NOT NECESSARILY THE BIGGEST."

FRED LEVRON
GLOBAL CCO, DENTSU INTERNATIONAL
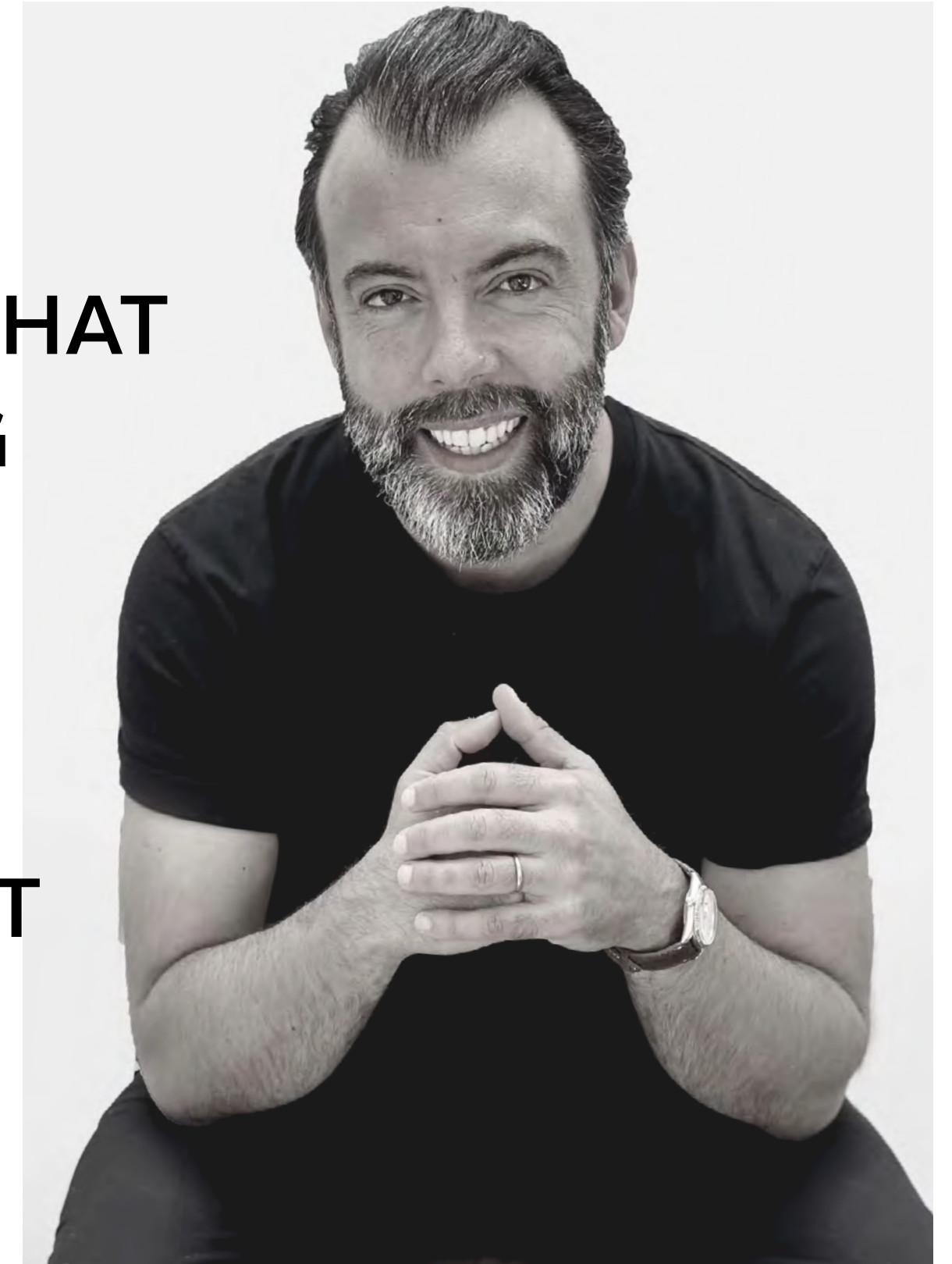
NEW WORLDS ORDER

"In a year when we have wrestled with a climate in crisis, a global pandemic, and rising inflation it is unsurprising that we see a profound desire for escape. That escape takes many forms; an immersion in virtual worlds, a step away from the corporate world, the creation of new, decentralised models for ownership and governance. Yet in this great decentralisation we see some vital seeds of hope and opportunity; opportunities to drive the fundamental pivots needed to create sustainable change." Pats McDonald, Global Head of Strategy & Consulting, Creative, dentsu

When we look forward to 2022 and beyond, we see a profound shift away from traditional centres of commerce, community and connection. Some talk of the Great Resignation, others about the possibility of another great migration away from urban centres.

What we see most profoundly is a great decentralisation, powered by virtual economies, crypto-currency, climate anxiety and distributed workforces. A shift towards networks of choice, passion, collective ownership and mutual reward.

A generation is emerging who see virtual goods, products, services and relationships as no less valuable than physical ones. Crypto currency and NFTs are enabling a generation of investors to redistribute wealth and reimagine ownership as the boundaries between fans, owners, investors and creators blur.

Cities and offices alike must reimagine their purpose as many office workers have determined that there is no going back to the daily commute, and for many, no return to a 9-5 of any kind.

Alongside a desire to escape, we also see a profound desire for self-sufficiency, fuelled by rising climate anxiety. We see a significant shift among major manufacturers from a consumption-based economy to a circular economy, empowering users to reuse, repair and repurpose.

With that focus on self-sufficiency comes a realisation that we each contain multitudes; that identity is fluid and can be navigated and defined in many ways. Generationally we are reaching a tipping point where our society is inherently multi-cultural and where binaries and borders are increasingly irrelevant.

Within this New Worlds Order brands and businesses can play a powerful role not only connecting to consumers but connecting communities to one another.

'Dentsu Creative Trends 2022: New Worlds Order' was developed with strategists and futurists from across the globe, and the report brings together dentsu's most senior talent and rising stars from Generation Z across dentsuMB, Isobar, 360i, and dentsu agencies to make sense of a rapidly evolving cultural and commercial landscape.

5 KEY THEMES FOR BRANDS & BUSINESSES

ALTERNATE REALITIES

The rise of virtual worlds and alternate narratives for a world where we can truly choose our own adventure, persona and reality.

REDISTRIBUTED OWNERSHIP

New models for collective & community ownership accelerated by cryptocurrency and powered by fan communities.

CONSCIOUS DECOUPLING

A new found urgency to decouple economic growth from environmental impact and to remake the world of work for a climate in crisis.

GENERATION "ALSO ME"

The emergence of a generation who defy categorisation and embrace multitudes.

PERSONAL BUBBLES

A new found focus on the self, the body and the home as a source of truth and comfort in a fast changing world.

/ WELCOME!

ALTERNATE REALITIES

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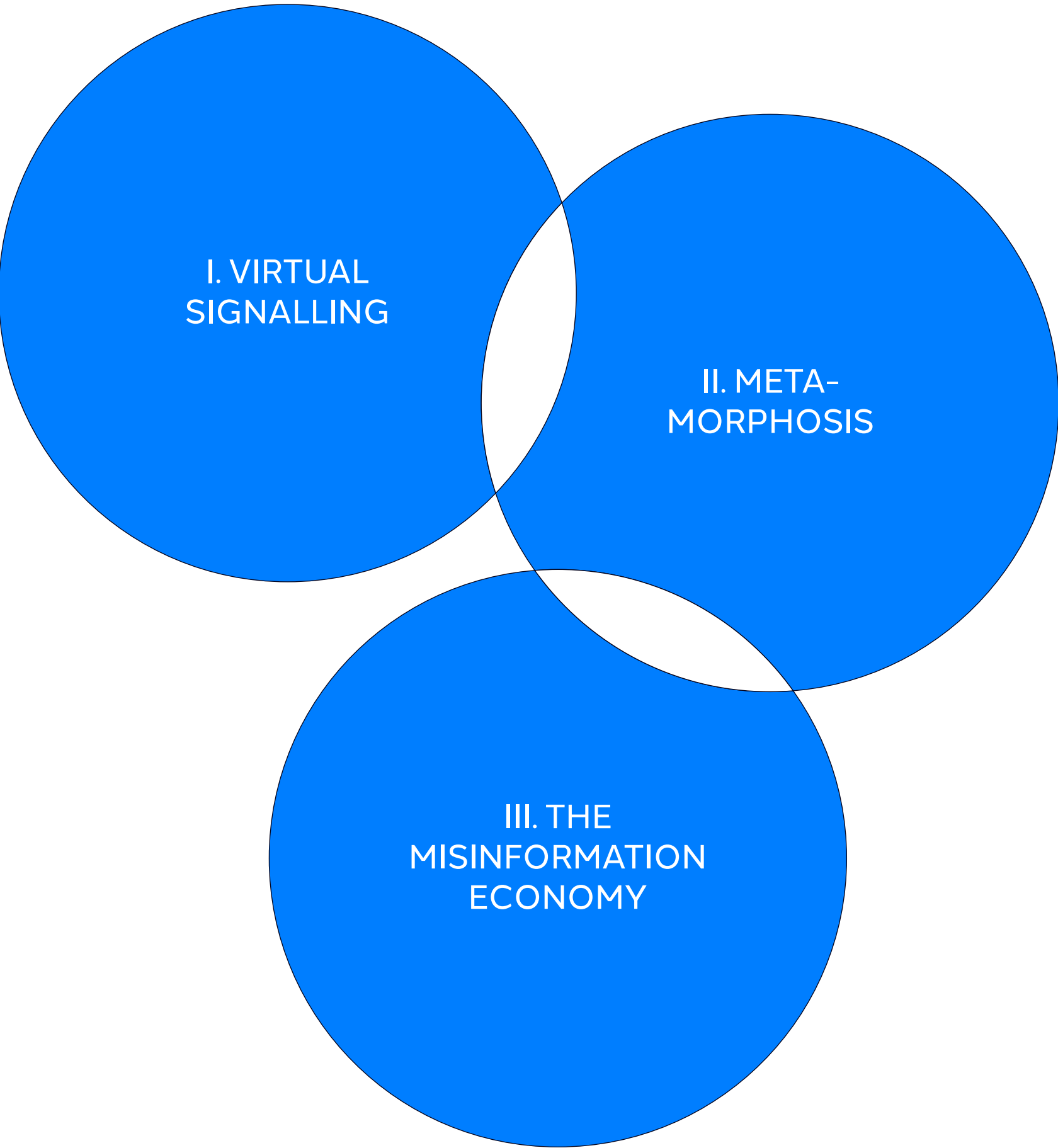
01. ALTERNATE REALITIES

Powered by gaming engines and cryptocurrency we see a new reality emerging where virtual products, services and experiences are no less valued–or valuable–than their real world counterparts.

Barriers to creating immersive, pixel perfect virtual environments are coming down at speed powered by technologies such as Lidar and gaming engines like Unreal.

While the ultimate goal is to create virtual experiences that feel completely real, the debate over our perception of photo realism vs stylised virtual places and people continues. This race pits technologies used to reproduce reality against the machines that can create a less real, but equally "meaningful" experience.

Within this space we both see users managing to explore identity and manage their mental wellbeing in safe spaces and uncomfortable social issues rising to the fore. A darker side of this trend is perhaps the rise of misinformation and the collapse of trust where different audiences have very different perceptions of what reality may be.

Within this space we see 3 important themes emerging.

I. VIRTUAL SIGNALLING

II. META-MORPHOSIS

III. THE MISINFORMATION ECONOMY

ALTERNATE REALITIES

HOW IT STARTED

Separation of Powers: Virtual worlds have been with us for decades, but in the early days of Second Life and clunky VR headsets felt very separate and distinct from real world experiences.

HOW IT'S GOING

Blended Realities: The rise of effortless in-browser Augmented Reality experiences, lightweight headsets and ever more powerful gaming engines mean virtual or augmented experiences are becoming ever more seamlessly interwoven with the physical space.

WHERE IT GOES NEXT

Virtually Impossible: As real time rendering, motion capture and CGI technologies accelerate it will become increasingly difficult to tell real and virtual experiences apart, and increasingly easy for users to make their avatars their primary way of interacting with the world.

I. VIRTUAL SIGNALLING

Luxury goods are embracing the gaming space at speed, understanding that virtual status is as important as physical status for a generation raised in virtual environments.

Abundance—the ease with which things can be copied, shared, and spread—has long been one of the most disruptive aspects of the web. With the rise of NFTs and limited edition digital "drops" digital scarcity becomes a force for disruption.

This is a world where a virtual Gucci handbag sells for more than the real world equivalent. The Gucci Dionysus bag sells for around $3,500 in the real world. Generating something of a quandary in brand value creation, as part of a limited edition collaboration with Roblox, a virtual equivalent of the bag was resold in the game for $4,115 (350.000 Roux in the game's currency).[1] Gucci has also embraced partnerships with gaming platforms from Pokémon Go, Tennis Clash, The Sims and Animal Crossing.

Historic Parisian fashion house Balenciaga launched a multi-layered, cross-reality campaign with cult game Fortnite creating a best-of-both blueprint for in- and out- of-game activation. Consumers could buy physical Fortnite x Balenciaga products in store unlocking the Balenciaga collection in Fortnite; they could also unlock exclusive Triple S Sneakers from the "Strange Times" hub within the game; exchange looks with other players and feature on both real-world and in-game billboards.[2]

In November, Nike launched Nikeland; a virtual Nike world within Roblox. Users can play games and equip their avatars in virtual Nike kit. Users will also be able to use their movements in the real world to control their avatars through accelerometers in their mobile phones. Further blurring the boundaries between on and offline, visitors to Nike's House of Innovation can experience Nikeland in the real world through an AR experience powered by Snapchat.

This is also a world where the "impossible furniture" of Andrés Reisinger—designed to be placed in virtual spaces such as Minecraft and Decentraland-sells for tens of thousands of dollars at NFT auction. The impossible furniture is then made entirely possible and sold in the physical space, helping reimagine old models of mass production, but also breaking boundaries in what is physically possible by starting life as a digital design, unlimited in its imagination.

In the food category, the HoloLamp platform enables diners to see their food at the table before they order through interactive Augmented Reality enabled menus. Virtual goods have also taken the art world by storm: world-famous auction house Christie's made history when Everydays—The First 5000 Days, an artwork minted as an NFT by digital artist "Beeple" aka Mike Winkelmann sold for $69.3 million.[3] This crystallised 'virtual' assets as assets of perceived value in their own right and propelled awareness of the acronym "NFT" into the mainstream realm.

Of course virtual art also needs a virtual showcase—enter platforms such as OnCyber which enable users to create virtual 3D rendered galleries showing the art associated with their wallets on the blockchain. Similarly, our dentsuMB Brazil team created a platform for virtual street art to celebrate the 466th anniversary of Japan House, a cultural hub belonging to the Japanese government.

Across every industry vertical we see increased interest in virtual or remote products and services. 83% of CMOs surveyed agree they will offer more remote or virtual products, while 47% expect to see the increased importance of virtual experiences persist post Covid.[4]

ALTERNATE REALITIES

/ 01

WHEN I WAS YOUNGER, I WOULD WEAR COOL SNEAKERS AT RECESS.

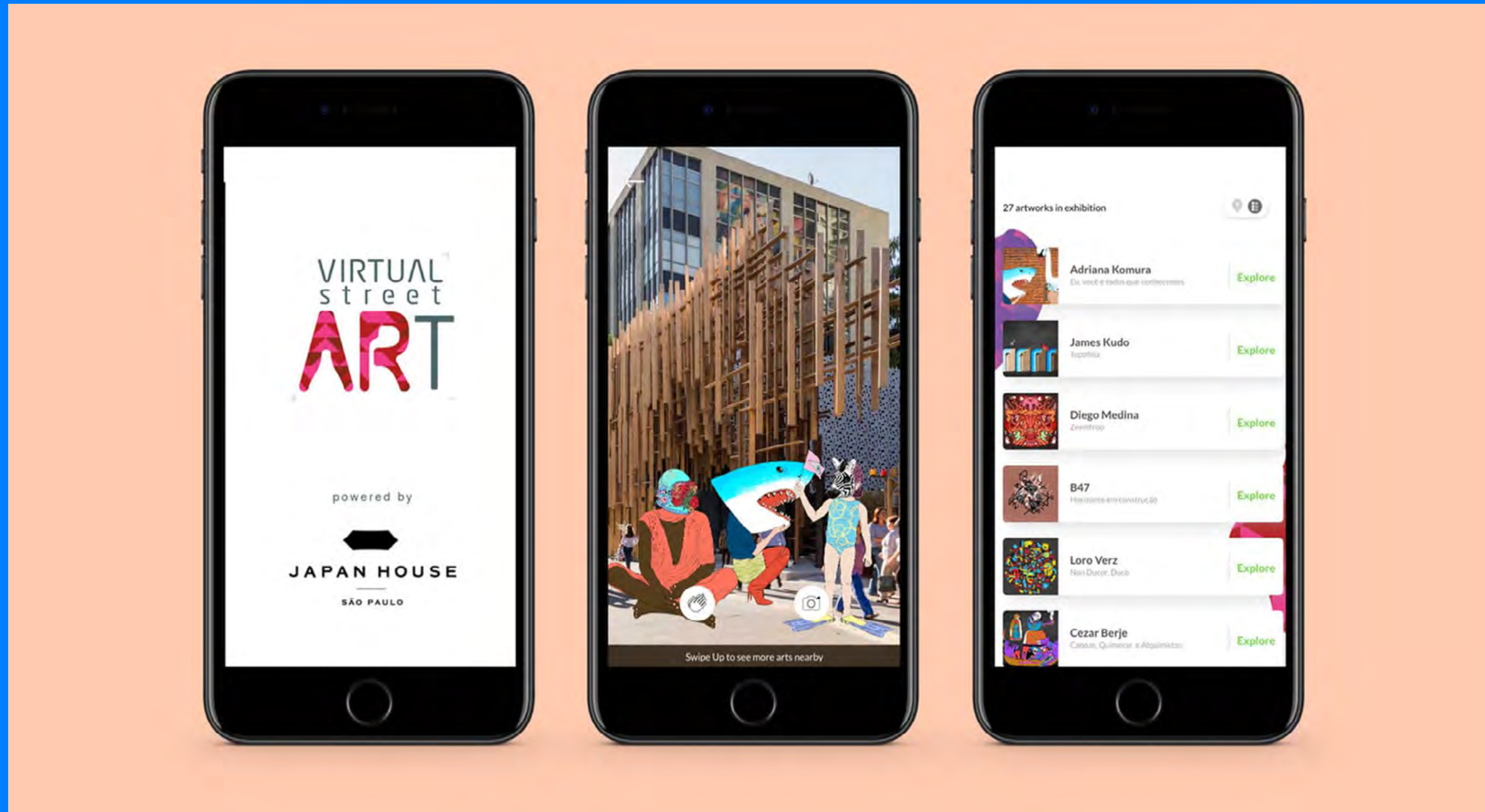# NOW — THAT HAPPENS IN THE DIGITAL WORLD, WHERE YOU SHOW OFF THE COOL ITEM YOU PURCHASED.[5]

RUDY KOCH
MYTHICAL GAMES CO-FOUNDER & SVP OF BUSINESS DEVELOPMENT

OUR WORK

VIRTUAL STREET ART

Virtual Street Art proposes an exchange between art and the general public, on the street, through technology. The app works by geolocation and it positioned 27 works of art across several spots along Paulista Avenue in Sao Paulo.

Through AR, the public was able to Interact virtually with each work of art. In this app, dentsuMB handled the images in 3D, offering complete interaction between the work of art and the public, who in turn were able to appreciate said works across several angles.

ROBLOX PITCH BLITZ

Isobar Italy launched Pitch Blitz on Roblox—the first agency in the world to launch in the metaverse. Pitch Blitz invites players to create their own virtual worlds and socialise with other users.

Upon entering they have ten minutes to complete a pitch, collecting special gems scattered across four areas and as many secret worlds as they can. From conception to implementation, from project managers to art directors, every facet of Isobar is conveyed in its most imaginative and surprising form.

II. META-MORPHOSIS

Virtual spaces have also become spaces where people can play with identity and tackle important social issues in new ways.

Not only has representation become increasingly important in gaming environments, so too has the ability to experiment and express your identity in new ways without fear of physical threat or intimidation.

This blurring of the boundaries between the physical and the virtual spurs new possibilities in both realms. As Jae Slooten, Co-Founder of The Fabricant, says "The virtual world and the real world will integrate. For me, that is a very interesting part. Where does my physical body end and where does the digital body begin?"[6]

It's a question many young people coming of age in a world of avatars may ask; the rise of virtual worlds creates huge potential to play with their identity in safe spaces. How much easier and safer to experiment with gender and identity in the virtual world than on the high street? And how empowering and inclusive could it be for some to have our avatars speak for us?

On a commercial, baseline level this could be as simple as providing virtual 'try ons' where customers can experiment with beauty looks on virtual avatars like Nars x Drest. We also see L'Oreal with its Signature Faces collection playing with what the real self versus the augmented or avatar self looks like, and where that boundary lies.

However, game-led metaverse futures create opportunities to go way beyond that. FOX Entertainment's new show Alter Ego twists the popular TV talent show format inviting "singers from all walks of life [to] become the stars they've always wanted to be" performing on stage via the dream avatar of their own design.

We also see the rise of Vtubers (virtual YouTubers) using AI to change their appearance as part of their digital broadcasts. Miko is one of the most prominent virtual streamers created using powerful Unreal Engine rendering software and controlled via an Xsens motion capture suit.[7]

A great example of a practical and ingenious application of this technology is Cadbury's Divali campaign featuring Bollywood superstar Shah Rukh Khan. They used Machine Learning to create bespoke versions of the commercial where the star would appear to promote local stores, empowering small businesses to create their own versions of the ad and supporting those businesses hit hardest by the pandemic.

Unprecedented rendering capacity is enabling users to imagine and manifest new identities as means of liberating experimentation or even escape. As Tom Faber, writing in The Guardian UK, puts it: *"It is not a coincidence that the age most people get seriously into gaming is adolescence, a stage of life when our sense of self is in flux and we actively seek to define ourselves. Players questioning their gender identity can experiment without social judgment, consequences or commitment. For a young person assigned male at birth to walk down the street in a dress could be a terrifying, even dangerous experience. To design a female avatar and step out into a virtual city could hardly be easier or safer."*[8]

OUR WORK

KSF NOODLES X LUO TIANYI

Isobar China created a very real birthday celebration for Luo Tianyi, a virtual idol. As the biggest fan of the virtual singer, Kang Shi Fu crispy instant noodle 'Xiang Bao Cui' gathered all the idol's fans online to create the hottest gift for Tianyi's 9th birthday. We also extended the experience to Weibo and WeChat users, to collect User Generated Content to prepare for the birthday party.

Kang Shi Fu and Luo Tianyi officially announced the countdown of the big day through both their WeChat accounts, while Luo Tianyi called all her fans for UGC on Bilibili and launched a Weibo topic page, which generated social buzz and inspired fans of the virtual idol as well as ACGN fans to create their own celebration videos using Xiang Bao Cui products.

MOTION X DENTSU: MOTION DATA LAB

This proprietary platform collects motion data that can be measured for use in technology and integrated into daily life. Following advances in Smart Apparel and image recognition technology, human movement can be digitised in any location. The Motion Data Lab created by Dentsu Inc. designed a platform that transforms the potential of motion data into value.

By storing massive amounts of motion data on a daily basis, we hope to innovate a range of industries by, for example, using it to predict the risk of disease, improve athletic performance, and help pass on traditions and culture. Our goal is to make motion data an invaluable resource for mankind.

PERSPECTIVES FROM A NEW GENERATION:
WHEN YOU'RE DETACHED FROM YOUR DIGITAL IDENTITY, YOU FEEL HALF A PERSON

We're in a world where your digital and real-life blends together to create this unique form of identity. And for many today, particularly my generation, Gen Z, when you're detached from your digital identity, you feel half a person.

You have an augmentation of whatever digital realm you're in. It could be Tumblr where my friends would just post anything and be their real and authentic selves. For some it's Instagram and others like me, it was through gaming. That's where I felt my identity align in terms of the stuff I liked and the conversations I wanted to have. It all felt validating and felt real.

For a lot of younger people, they found their true identity in the digital world to the extent that sometimes I don't know where a 'real' person starts and where a 'digital' person ends. Identity is fluid because people get caught up across different worlds. You boot up a random game and become a completely different person. For example, I'm a big fantasy football player, but I close the window and next up I'm a huge anime nerd. Being so fast and fluid makes it interesting, creates some really fascinating people, and is developing the most multifaceted generation ever.

As for brands playing in this space, it's hard to just lightly touch a community then let go. You need to hop from community to community, understanding what's in, the jargon, the in-jokes, who's who, who's popular and what's the drama? So if brands really want to have an authentic engagement, they need to understand these dynamics and be able to switch their own different identities across different environments.

Sam Kieme
Social Strategy Manager, dentsu Canada

III. THE MISINFORMATION ECONOMY

The rise of co-ordinated misinformation campaigns, personal filter bubbles and deepfakes creates a dystopian potential for us to live side by side in very different realities.

Whilst the internet has become a space of unparalleled expression and community it can also, as we have witnessed in multiple ways, become a place where misinformation can thrive, often through highly co-ordinated action.

Verification of information has become a considerable issue in the past two years alone. In the early days of the pandemic, the United Nations launched Verified relying on volunteers to share UN approved, science-based information with social networks in order to counter the spread of false information.

We've seen verification evolve into apps and plugins to help people make holistically informed decisions. Take shADe, an "anti-greenwashing" web plugin designed to help consumers make purchasing decisions that better reflect their values. Where usage of attributes like 'green', 'sustainable', 'ethical' are currently unregulated, shADe connects to the Good on You's brand rating database to give customers a rating on their favoured product in real time.

Software giant Adobe is working on a series of programmes to help users identify if and to what extent images are manipulated in a bid to combat deep-fakes. The proposal is to feature an icon that will open up information about the photographer and a history of edits made to an image.
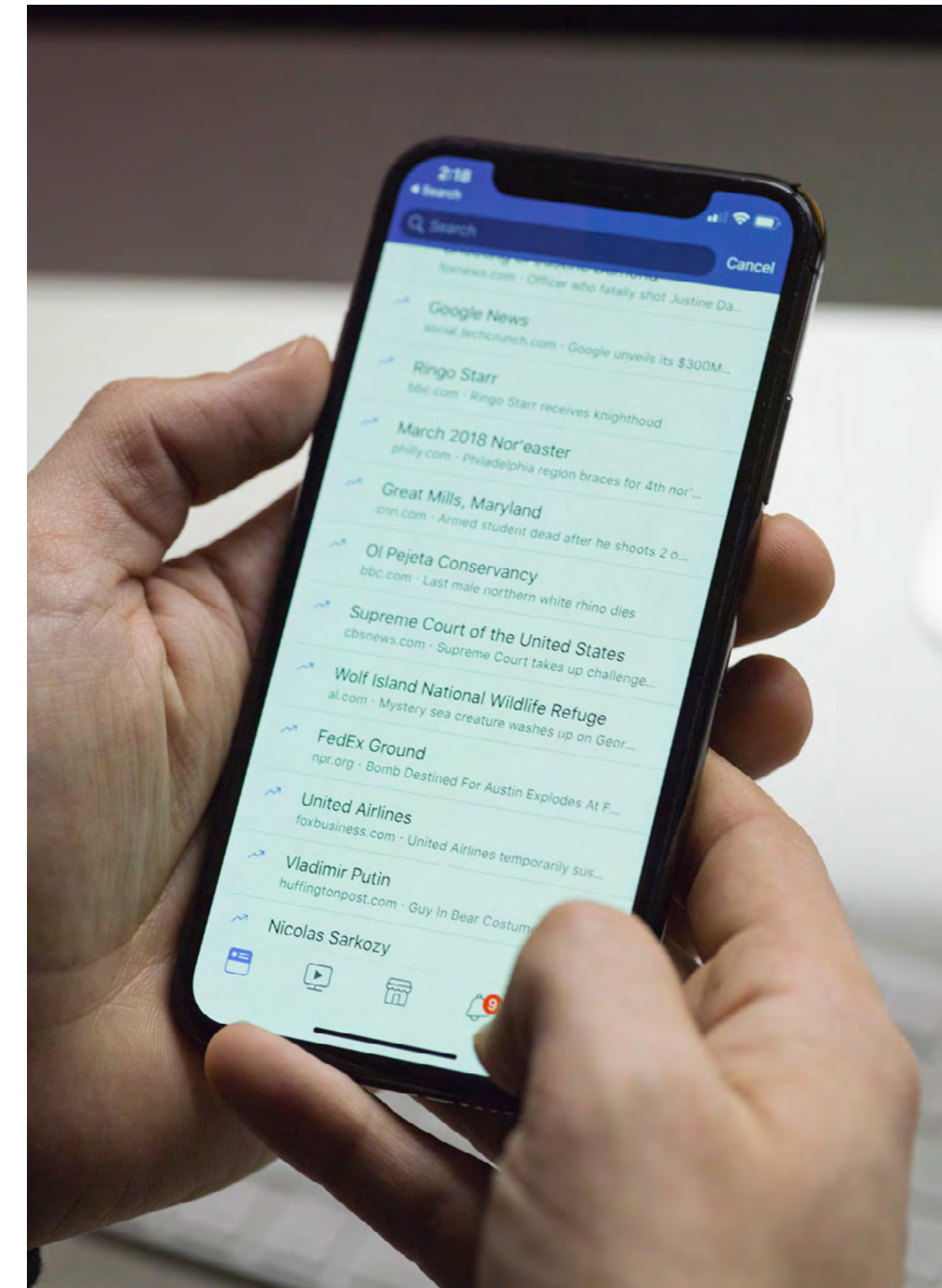
PERSPECTIVES FROM A NEW GENERATION:
VIRTUAL FUSION

The health emergency has certainly accelerated the fusion between the virtual world and the real one.

Cryptocurrencies that were previously bought as a high-risk investment are now used to make purchases; tokens that were previously intended only as information recorded on the blockchain are used to purchase the right to say that an object is exclusively owned by you (NFTs); virtual spaces initially created as games can now be a place where people escape from reality, where they can be themselves without being afraid of repercussions of any kind.

However, one wonders where will the metaverse lead, and whether it can be considered "healthy" for people to live only in that world, or in the long run it may become too alienating?

At this point, we should perhaps redefine the concept of "healthy": if the meaning of healthy today includes a whole series of conventions and social rules, then no, it is not healthy. But if by healthy we want to imply a more intimate and personal meaning – understood as attention to the person – such as mental health, then yes, it could be.

If a person who in the real world cannot fill the requirements of a whole series of checklists imposed by society and cannot feel comfortable with certain dynamics, why shouldn't they be able to create their own world and feel good? In this sense, the metaverse is a great opportunity, especially for young people: a virtual place where you can experiment, understand who you want to be, explore your own identity and express yourself.

Another issue we will soon find ourselves facing is sustainability. The validation of NFTs and cryptocurrency transactions generates very significant energy consumption. The NFT creation process, in fact, depends on the computing capabilities of thousands of computers that require much greater energy consumption than standard server tasks. Unfortunately, to date there is still too little attention to sustainability – and the brands that are entering this world will have to keep in mind that the effects of cryptocurrencies and NFTs are real, not virtual.

The last theme that I would like to mention is the local aspect of alternate realities. We are witnessing multinationals and big brands taking their first steps into the world of the metaverse, but when will this fusion be really tangible? Probably when even smaller communities or rural businesses know more about this topic and develop some experience in this world.

At the moment, in Italy, some small businesses such as pizzerias have begun to accept payments in cryptocurrencies during the bitcoin pizza day. This is just a small but important step on the journey.

In conclusion, the rise of the virtual world, an increasingly fluid self that is free from categorizations, environmental sustainability and the importance of local communities, are all themes that do not live separately, but are deeply intertwined and reflect a social conscience that matures every day. The role of brands in this context must not only be that of facilitators of fluid experiences between the two worlds but must go further: brands must be the first promoters of the potential of a second world, a world made up of opportunities, and the advocates for a lower environmental impact of cryptocurrencies and NFTs.

Francesca Morrone
Digital Strategist, Storylab, Italy

WHAT IT MEANS FOR BRANDS

VIRTUAL STATUS IS ALL TOO REAL

For a generation raised on gaming, how they present themselves in game is every bit as important as how they present themselves in the real world. NFTs have introduced a model for digital scarcity and any brand for whom a sense of exclusivity and social currency is key should be considering their virtual product portfolio.

EMPOWERING SELF-EXPRESSION MATTERS

Just as virtual status matters, so too does self expression in the virtual space. Empowering users with the right "skins", accessories, apparel and avatars to explore and express their identify is a powerful emotional territory for clothing, beauty, and self care brands to play in or indeed for any brand with a commitment to inclusion and representation.

LETTING DEMAND DRIVE SUPPLY

The rise of pixel perfect CGI and Real Time rendering upend traditional models of supply and demand, creating a world where users can explore virtual products before confidently ordering the real world equivalent. Meanwhile new production techniques challenge the "one size fits all" model, enabling an on demand manufacturing model to thrive.
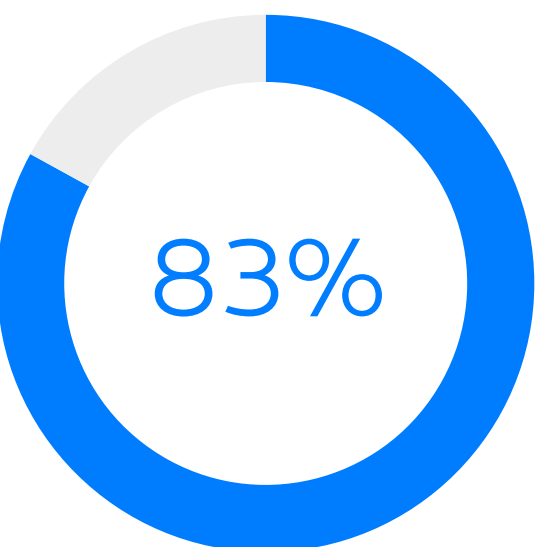
A LOOK AT THE NUMBERS

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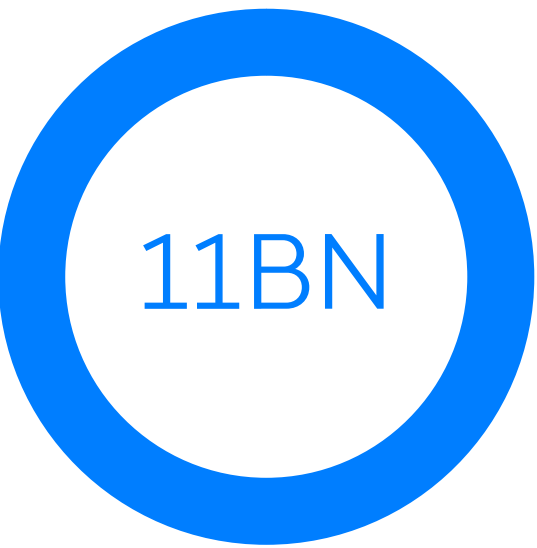
Dollars worth of NFTs were sold in the last quarter alone.[9]

$19K

Paid for a virtual hoodie from the streetwear label Overpriced.[10]

83%

Of CMOs agree they will offer more remote or virtual products and services going forward.[11]

REDISTRIBUTED OWNERSHIP

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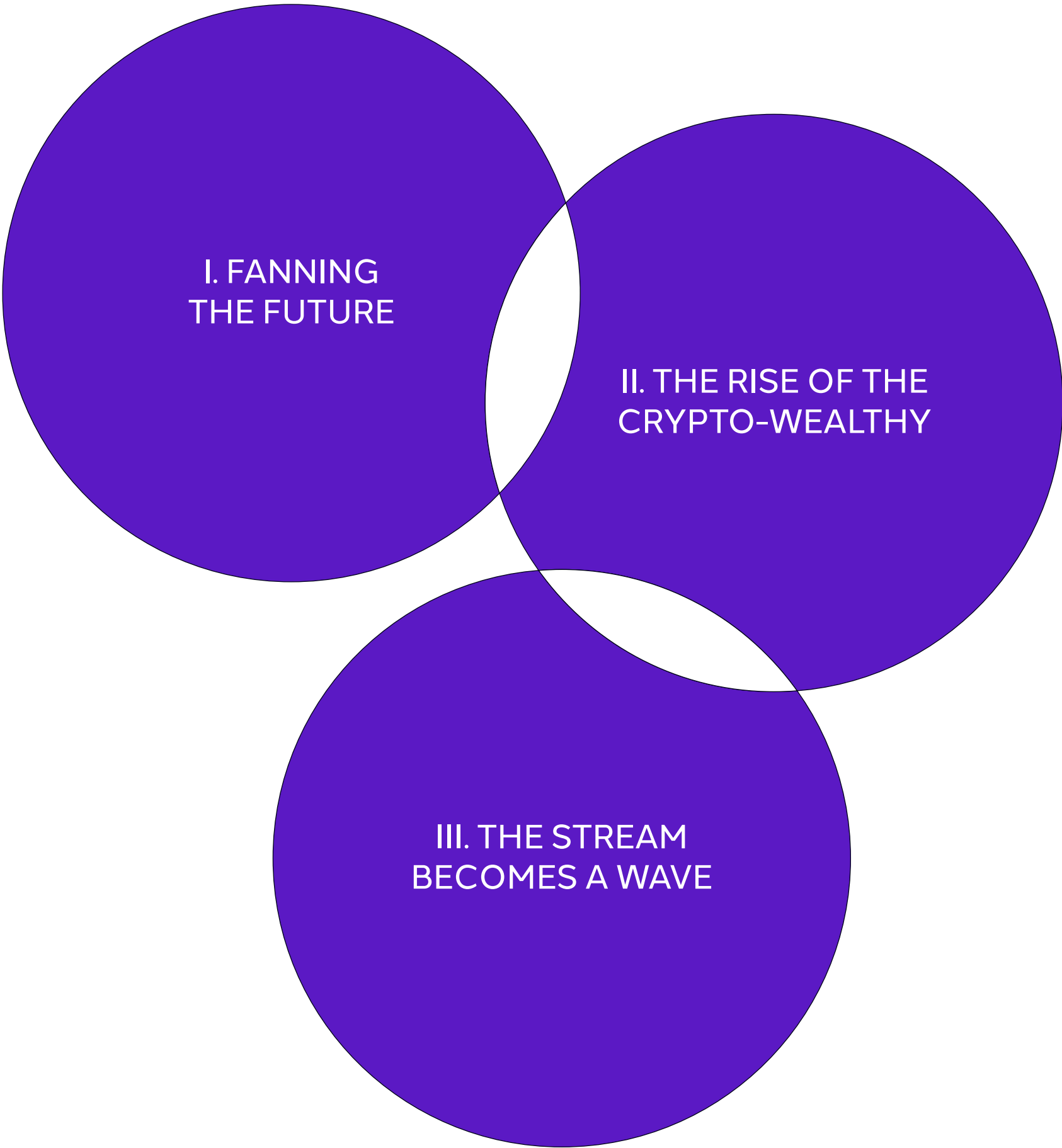
2. REDISTRIBUTED OWNERSHIP

In another trend powered in part by blockchain technology and cryptocurrencies, we see new ownership models emerging which blur the boundaries between creators, businesses and the communities they engage as never before.

We also see brands in the offline world begin to offer their customers an opportunity to own a stake in the business and for the business to expand their own distribution footprint. L'Occitane digitised the Avon lady model for the 21st Century equipping its customers with the digital tools and skills needed to become entrepreneurial store owners in their own right.

This is an area where we have experience through our work with KFC, where we created the KFC Pocket Store, enabling every KFC customer to become a virtual store owner. 8M pocket stores have been opened to date with one customer alone selling $1M of KFC product.

We also see a new era of financial opportunity open up for a generation who might previously not perceived themselves as investors; cryptocurrency being the only financial vertical where younger investors over index versus older generations.

Among young consumers in the UK we see a broader anti-capitalist trend, with 80% blaming capitalism for the housing crisis and 75% agreeing that "the climate emergency is specifically a capitalist problem."[12]

I. FANNING
THE FUTURE

II. THE RISE OF THE
CRYPTO-WEALTHY

III. THE STREAM
BECOMES A WAVE

REDISTRIBUTED OWNERSHIP

HOW IT STARTED

The Sharing Economy: Web 2.0 sparked a wave of start-ups enabling users to share physical goods and services, such as ride sharing services, Neighbourgoods, Couch Surfing , Relay Rides and so on.

HOW IT'S GOING

Collective Ownership: Web 3.0 enables shared ownership on a more profound level. Blockchain technologies mitigate the potential for personal loss by creating shared visibility of activity within the network.

WHERE IT GOES NEXT

Peer to Peer to Pixel: We anticipate a rapidly scaling peer to peer economy for virtual goods and services as users seek to fully own, resell and monetise their virtual assets from art to "skins" to sneakers. Expect to see virtual resale and rental platforms borrowing the behaviours of Goat, Stock X and Rent the Runway.

I. FANNING THE FUTURE

Fans have become owners and patrons in the new economy, as creators seek direct relationships and direct funding.

Decentralised Autonomous Organisations (DAOs) are creating a new model for governance, transparency and collective action. In an extraordinary reversal, PleasrDAO acquired the-one-of-a-kind Wu Tang Clan album "Once Upon a Time in Shaolin" famously once owned by pharma millionaire Martin Shkreli. The Constitution DAO raised funds to purchase a 1787 copy of the US Constitution at auction. In an amazingly symbolic act, the DAO aimed "to put the constitution in the hands of the people." The team raised over $46m and made history as the first DAO to bid using Ethereum at Sotheby's auction house but were sadly outbid.[13]

In the commercial space, a new wave of loyalty programmes is emerging where consumers can monetise their advocacy in new ways and brands can monetise secondary sales in traceable ways. Burberry released limited edition "Burberry Blanko" characters and accessories within the Blankos Block Party game where Burberry earns proceeds from every sale and a percentage of every secondary sale.

Beyond gaming, organisations are creating opportunities for fans to profit from their devotion through decentralised technologies. Last year, the NBA partnered with blockchain company Dapper Labs to create NBA Top Shots, an online marketplace where fans can buy and sell video clips of professional basketball games. The platform has proven so popular in September 2021 it announced it has raised $250m and is now branching into soccer.[14]

OUR WORK: KFC POCKET STORE

Isobar helped KFC transform its relationship with young consumers, realising the power of showing, not telling.

With its own digital ecosystem which provided a deep understanding of each customer's likes and dislikes, from products to promotions, campaigns to experiences to transaction, KFC connected with its millennial consumers, reinventing the customer experience through technology and creativity.

KFC Pocket Store, in partnership with WeChat, reimagined social commerce enabling every customer to open their own virtual KFC store.

The transformation earned KFC 215 million loyalty memberships, from zero in 2015, and 13 consecutive quarters of growth. KFC became the most influential restaurant brand in China.

215M

Memberships

8M

KFC Pocket Stores
Opened to Date

13

Consecutive Quarters
of Growth

II. THE RISE OF THE CRYPTO-WEALTHY

Cryptocurrency is creating a new wave of wealth and opportunity among demographics who might not previously have engaged with assets or investments.

In a highly symbolic gesture, the iconic Staples stadium (home of the LA Lakers) will rebrand as the Crypto.com stadium on Christmas Day 2021, in a $700M naming rights deal-a sign of just how ambitious Cryptocurrency is to enter mainstream culture.[15]

Cryptocurrency is also the only financial sector where participation is higher among younger adults than older. 15% of 18-34s in the US invest in cryptocurrency vs just 4% of investors who are 65+[16]. Crypto currency is also much more balanced in terms of the ethnic diversity of investors but not yet, interestingly, in terms of gender; twice as many men as women still invest in cryptocurrency.

The BBC recently reported that 6% of students in the UK were investing in cryptocurrencies to help fund life at university - a threefold increase in the past year alone.[17] However, the emergence of crypto-wealth is not without critique with The Financial Conduct Authority suggesting "young people are investing in high-risk products for the 'challenge, competition and novelty' involved".[18]

Meanwhile the increased adoption of NFTs by mainstream entertainment brands such as Warner Brothers and Hasbro-who recently launched Power Rangers NFTs on the WorldWide Asset eXchange blockchain-makes entering the world of digital assets accessible to the many, not the few.[63]

New avenues in wealth creation are springing up through initiatives such as Yield Guild Games, a "play-to-earn gaming guild". Users connect their crypto wallet to instantly start earning as they play Yield Guild Games.

This ability for fans and players to monetise their own time is an interesting shift from a world where typically media and entertainment platforms have monetised their time and attention.

In the social impact space, a youth soccer club in Canada found that rain was constantly stopping play. The Club has created a collection of 5,000 NFTs, each representing a virtual section of the club's future, weather proofed field to sell on the Open Sea NFT Marketplace with the aim of raising $1m.

PERSPECTIVES FROM A NEW GENERATION:
DISTRIBUTED OWNERSHIP, COLLECTIVE WILL

Crypto is everywhere. It is an important asset class, shaking up the art market, making policymakers nervous, gamers rich, besides emitting tons of CO2. But its rise also has an impact beyond spreadsheets. In how it's changing power dynamics, behaviours, and beliefs.

Return on (social) investment

Crypto is a social phenomenon first and an investment instrument later. The big influencers here aren't experts in suits. It's just, well, influencers. Elon Musk, the president of El Salvador, and Indian cricketers are driving adoption, prices and conversations. FOMO as much as ROI. While coins such as Ethereum (Mkt. cap: $500bn+) promise exciting new uses, some that started life as jokes (Dogecoin: $28bn+) are attracting serious money too. Social chatter is enlightening. "Diamond hands" (absorbing losses without giving in) make the new investment heroes. The social gratification of being seen as tough by peers compensating for financial losses.

Distributed ownership. Collective will.

In traditional markets, investors unintentionally copy each other. But the social breeding ground of crypto makes investors here more deliberate in their collective action. They persuade, challenge, and entice each other on social forums, leading to outsized amplification of every idea.

The repercussions are felt, not only in the markets, but also in business, policy, law and order, and so much more.

An interesting parallel was seen in this year's Gamestop short squeeze. In their conviction, many little guys acting together like one really big guy made the hedge funds fold, and the entire world take notice. Underestimate their collective power at your peril.

Diversifying portfolios. Disrupting culture.

Consider India. Crypto has done what no other asset class could. It made risk-averse Indians embrace volatility. For decades, Indians have stuck to gold, deposits and real estate exclusively.

But crypto today, aided by influencers and memes, has 15-20 million investors.[64] For context, India's stock market, one of Asia's oldest, has about 50M.[65]

What's more, most of these don't belong to the traditional investor profile (Moneyed, Middle-aged, Metro, Male). Close to 75% are between 20-35 years old.[66] Smaller towns such as Ahmedabad, Lucknow and Patna are growing at incredible annual growth rates of over 2600%.[67] What's changing is not only the way people invest but also the way they think, talk and feel about investments. This is all too evident in advertising.

Whereas mutual funds spoke of life goals, risk-reward, and discipline, crypto exchanges use rap, Bollywood, cricket and comedy to position it as the trendy tech that you're either part of or missing out on. When Indians today think of crypto, they don't just think of the returns; they also think of how cool it is.

Great technologies, like steam engines, computers, smartphones, transcend technical boundaries to inspire new behaviour and cultures. If its impact on investments is anything to go by, cryptocurrency might change more than just our portfolios.

Chinmay Karandikar
Group Planning Manager, dentsuMB Mumbai

III. THE STREAM BECOMES A WAVE

We also see a powerful force for the redistribution of revenue in the rise of live streaming and live commerce.

Individual streamers in China are selling billions of dollars' of product in a single day, transforming traditional routes to market. Li Jiaqi, one of China's most popular live streamers sold $1.9 billion worth of goods in a single 12 hour live stream, attracting nearly 250 million views.[19]

Recent analysis by McKinsey Consulting suggests live-commerce-initiated sales could account for as much as 10 to 20 percent of all e-commerce by 2026. Live stream sales in China alone are expected to reach $423 billion by 2022 up from $171 billion in 2020.[20]

Isobar Canada's 'Cadillac Live' redefined the shopping experience by converting a 10,000 square foot Toronto film studio into a first-of-its-kind digital showroom. 'Cadillac Live' is a one-part personal shopper, one-part interactive digital showroom experience, providing an immersive brand experience.

It gives luxury buyers the ability to conveniently explore the new Cadillac from anywhere and on any device. Guided by a Live Agent, consumers can experience the styling and features one-on-one or with a group. It also equips every agent with an app interface allowing them to showcase any colour, wheel, and accessory option on-screen for the consumer during the session.

This year, through advanced CGI and 3D rendering we were able to create a virtual live streaming experience, raising awareness and understanding of GM's new EV well before it rolled off the production line.

WHAT IT MEANS FOR BRANDS

SHARED SUCCESS

Consumers will increasingly seek out brands who reward them for their time and engagement. New, decentralised models such as peer to peer sales will power fandoms and build new relationships between businesses and communities.

DEMOCRATISING INVESTMENT

The crypto-rush shows just how hungry a younger generation are for financial advice and opportunity designed for the world they live in. Smart Fintech brands will design products and services designed for a generation engaging with their finances, and the world of work, in completely new ways.

BUSINESS IS PERSONAL

The phenomenal selling power of live streamers (and virtual live streamers) continues to accelerate, reminding businesses everywhere of the need for a more human and content-driven approach to commerce.
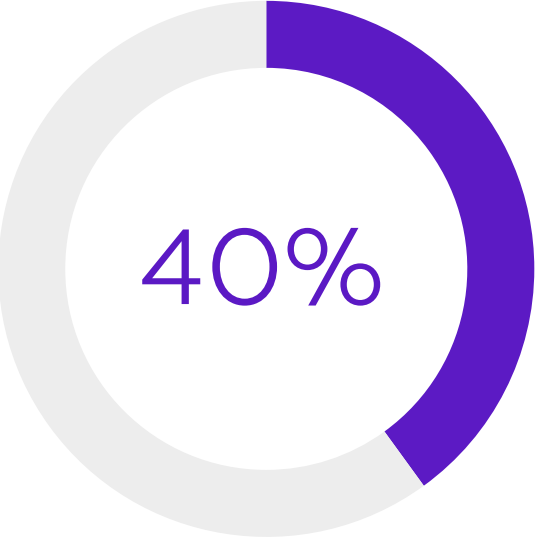
A LOOK AT THE NUMBERS
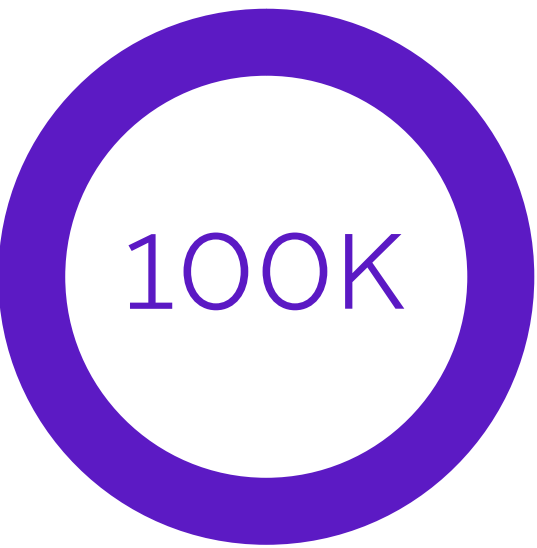
100K Unique Matrix-inspired avatars to be sold by Warner Brothers for $50 each.[21]

$4M Paid by PleasrDAO for the one-of-a-kind WuTang Clan album Once Upon a Time in Shaolin.[22]

40% Of CMOs have adopted Social Commerce, while 32% have adopted Live Streaming.[23]
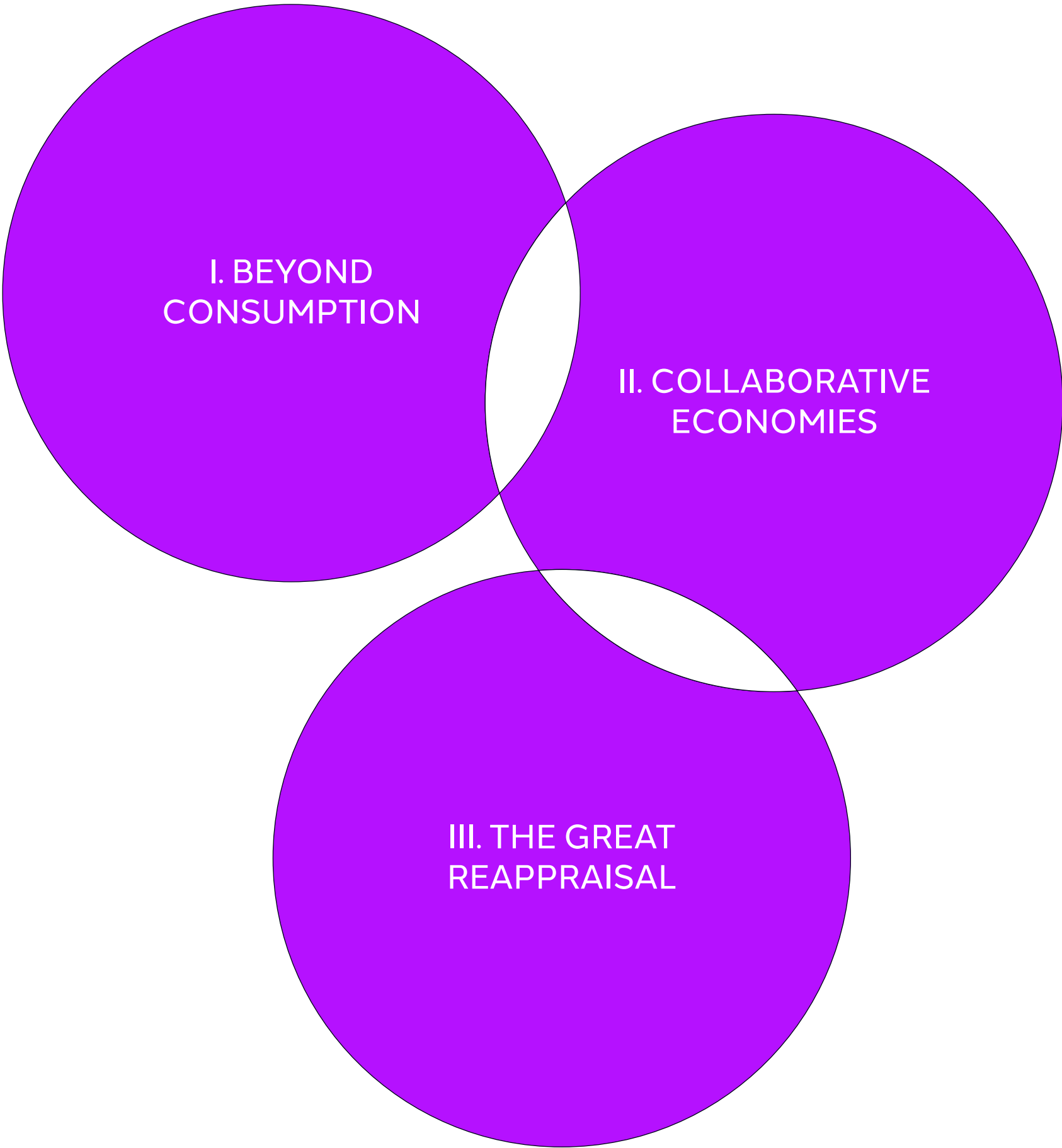
CONSCIOUS DECOUPLING

01   02   **03**   04   05

3. CONSCIOUS DECOUPLING

Another significant factor driving the great shift from centre is the ever-increasing urgency of the climate crisis. Amidst rising climate anxiety businesses are considering seriously how they can decouple their growth from their impact on the planet.

Some commentators have even considered whether a perpetual cycle of growth can be sustained, as the "DeGrowth movement", once a niche position, gathers in momentum.

The ambition for many however remains not DeGrowth but de-coupling; a model where GDP continues to grow but emissions shrink; in itself an ambition that will prompt many businesses to make significant pivots to their business model. As Kate Heiny of Zalando puts it:

"The holy grail for us is the decoupling of our economic growth from our social and environmental impacts. We need to move from a linear approach of the 'take, make, waste' and we need to move into a circular approach."[24]

I. BEYOND CONSUMPTION

II. COLLABORATIVE ECONOMIES

III. THE GREAT REAPPRAISAL

CONSCIOUS DECOUPLING

HOW IT STARTED →

Growth and Good: For many years brands have been championing social purpose, but often in a way that feels adjacent to their core business.

HOW IT'S GOING →

Growth from Good: We now find ourselves in a situation where more and more businesses realise that they must drive growth from good; reimagining a new and fundamentally more sustainable model.

WHERE IT GOES NEXT

The Greater Good: Systemic societal and industrial pivots enabling behaviour change at scale.

I. BEYOND CONSUMPTION

In 2021 we have seen businesses begin to reimagine their value proposition for a world where the relentless consumption of raw materials is no longer an option and a circular economy must be embraced at pace.

Smart businesses have begun the transition from a product or consumption mindset towards a service-based, circular model. Clothing brands such as LK Bennett are experimenting with rental models such as LK Borrowed. 27% of fashion businesses offer a recycling platform[25] while 49% of consumers say they are interested in using an online fashion rental platform.[26]

We now see a similar trend in the home furnishing space with the launch of luxury furniture rental services such as Feather and Harth offering design fans the opportunity to rent vintage or pre-loved interiors.

In August this year, British department store John Lewis announced a scheme to offer the customer the option to rent rather own pieces ranging from desks to sofas, perhaps reflecting the flexible and modular solutions needed for a world where our homes may shift from office to leisure and back again.

The resale market in fashion is projected to triple in value from £28bn (2019) to $80bn (2029) in the US alone.[27] Initiatives such as Madewell's partnership with ThredUp, H&M ReWear and Urban Outfitters' Nuuly Thrift proposition show how mainstream brands are adapting for a circular economy. Meanwhile For Days new "Closet & Credit" scheme displays two prices for each piece in the collection- the upfront cost and the amount you will receive as credit when you send the item back to be recycled.

Late last year Ikea announced their buy-back programme across 27 countries in an effort to combat unnecessary waste of products in resalable or reusable condition.

In the automotive space, neighbourhood EV charging schemes are emerging which enable users to share charging points with their local community, reducing barriers to the wider adoption of electric vehicles. Platforms such as Co-Charger and JustPark enable EV hosts to effortlessly manage bookings and billings, while enabling drivers to find a charging spot. Think Airbnb for charging.

Meanwhile in Taiwan, the Kymco company has introduced a real time battery swap service for EV Scooters, bringing fully charged batteries direct to electric scooter and motorcycle drivers-available on subscription or demand.

WE'LL GIVE YOU CREDIT FOR ANYTHING. WE DON'T CARE IF IT'S RIPPED, STAINED, WRITTEN ON, CUT. IT DOESN'T MATTER. WE'LL TAKE IT BACK.

AND SO I THINK THERE'S THIS INSURANCE POLICY BUILT IN WITH OUR SYSTEM THAT IS ENCOURAGING UTILISATION.[28]

KIRSTY CALOR
CEO AND CO-FOUNDER, FOR DAYS

OUR WORK: KFC PLANTABLE BASKET

KFC is embarking on a new environmental protection project with the ambition to be know as more than a fried chicken business.

KFC hopes to influence behaviours across society, its consumers and within its own corporation. KFC wanted to establish a new image to attract and educate consumers about the green initiative and to encourage people to reduce the use of disposable cutlery in particular.

We leverage the live-streaming trend and documented "planting grass" online. From seed planting to growth, we started a 30-day live video stream with real farmers in Inner Mongolia – the more engagement, the more seeds planted.

Their consumers scanned their KFC buckets for access. We also placed 5,800 basket recycling machines in KFC stores and created an integrated campaign to drive awareness.

PERSPECTIVES FROM A NEW GENERATION:
BEING ENVIRONMENTALLY FRIENDLY IS NOT MILLENNIAL FRIENDLY

It feels like conversations around climate change have reached a fever pitch, amplified by the 26th UN Climate Conference (COP26) hosted in Glasgow earlier this year. However, for myself, my peers, and friends, this is always a discussion point.

I've grown up with climate change. Like many of my generation, we have watched our parents recycle more, waste less, and seen enough adverts and documentaries to understand the devastating impact on our planet. We have inherited environmentally friendly habits that have become our routine (like brushing your teeth or eating five a day); however, as COP26 made clear, these small actions are not enough.

If we didn't have enough to worry about – low employment rate, student debts, mental health crisis and the unrealistic dream of affording our own home – millennials are also plagued by the responsibility to save the planet.

It is no wonder that over half of people my age experience 'eco-anxiety' and are distressed about climate change. As a generation, we feel helpless. As much as I want to save the planet, I don't have the means. Many of the more significant actions promoted by government campaigns are aimed at those with a house, car, children – not for people like me. Living in a city centre, top-floor flat with limited space for my belongings, let alone recycling bins. And it's not just me – others in a similar position have passed comments about landlords not servicing boilers, communal recycling bins overflowing, not having space for a food bin. It seems the problem is that being environmentally friendly is not currently millennial-friendly.

Businesses and brands provide us with an opportunity to consume our beliefs and act with our (virtual) purses. When I think of the brands that I love, admire, and purchase the most, they are brands where sustainability is a standard, not a trend—the products and services where creativity and innovation meet my needs and lifestyle but are accessible and sustainable. An excellent example of this is sustainable activewear brand TALA, which has achieved phenomenal business growth sold over 80,000 products by making sustainable fashion affordable and accessible to all. TALA positioned itself as an ethical alternative that was aspirational for me and my peers.

We are defining the habits that allow us to make change without affecting our future—like choosing a net-zero café over a multi-national chain, choosing an employer with green incentives, and choosing brands that do good. All these actions are our way of saving the planet.

As we move into 2022 and the conversations surrounding climate change get more complicated, we will see more young people taking the action they can. I am looking to businesses and brands to provide us with sustainable products and services that fit with my current lifestyle and makes reducing emissions more accessible, and affordable.

Louise Cox
Planner, Whitespace, An Isobar Company

II. COLLABORATIVE ECONOMIES

Sustainable change will require radical collaboration and we are seeing businesses make commitments in alliance with policy makers and other like-minded, often competitor organisations.

Brands who have successfully pivoted to a more sustainable supply chain are pivoting still further into the B2B space. In a bid to accelerate sustainable practices in the industry, Swedish retailing giant H&M Group launched Treadler, a B2B service offering other businesses the opportunity to access the group's considerable global supply chain, expertise and supplier partnerships.

Other sectors are collaborating to catalyse system changes. The UK's biggest supermarkets such as Tesco, Marks & Spencer and Asda are signatories of a new Textiles 2030 action plan which seeks to drastically reduce impact of the clothing industry on climate breakdown.

End-to-end commitments include - improving durability and recyclability of garments, enabling clothing reuse and recycling fibers.

Former Apple designer Sir Jony Ive is partnering with Prince Charles to open the Terra Carta Design Lab at Royal College of Art London with a view to developing "small designs that make a big impact for the world's transition to a sustainable future" backed by $10bn from the private sector.[29]

OUR WORK: COLLECTIVE IMPACT FROM THE CITY OF KITAKYUSHU

Our teams in Dentsu Japan leveraged the Dentsu-Group's problem- solving capabilities to help enable collaboration across 15 businesses, organisations and the local municipality.

The collaboration enabled completely decomposable paper cups to be recycled into compost and used to grow vegetables, in an experiment that took place during the "Giravanz Summer Festival 2021" hosted by the Giravanz Kitakyushu Football Club. The project started from a partnership between Mitsubishi Chemical Corporation, NTT Business Solutions, and Well Create Co., Ltd.

Then Dentsu, Giravanz Kitakyushu and others joined the team, until there were 15 diverse businesses and organizations on board to contribute their unique capabilities.

Mitsubishi Chemical developed paper cups made of biodegradable plastic, and the paper cups were used at an event hosted by Giravanz Kitakyushu. The used paper cups were collected and forwarded to NTT Business Solutions and Well Create, who mixed them with food waste and produced compost using a food waste fermentation/decomposition machine (Fourstars).

A portion of the compost was given to a local high school where it is used to grow vegetables. The vegetables will be harvested and sold at the stadium. A total of 15 businesses and organisations, including a beverage company and a municipality, participated in this demonstration experiment of a local food supply chain system starting at a football stadium.

III. THE GREAT REAPPRAISAL

In another sign that we may be entering a very different economy, we see more people leaving their jobs than at any point in recorded history.

In August alone 4.3 million Americans quit their jobs.[30] More than half of 18-24 year olds and 31% of 25-34 year olds are searching for a new job[31], while in the UK more than 56% of unemployed people are not actively looking for a new job.[32]

In an extraordinary shift in mindset we're seeing the rise of the 'no-work' movement. The /antiwork Subreddit is nearly at 1 million members as the pandemic has thrown work-no-work-life-balance priorities into sharp relief.

This trend is reflected across sectors — take the 42 percent of healthcare and social-assistance workers who quit their job without having a new job lined up — a powerful testament to the role of workplace dignity, conditions and culture.[33]

A new generation, their future uncertain in a world of climate crisis, begin to prioritise time and wellbeing over the primacy of work at all costs.

"First named by the writer Nilanjana Roy in a 2016 column in the FT, time millionaires measure their worth not in terms of financial capital, but according to the seconds, minutes and hours they claw back from employment for leisure and recreation" Sirin Kale, The Guardian[34]

PERSPECTIVES FROM A NEW GENERATION:

In the past, when consumerism was over-rated, we were not used to thinking beyond consumption: we thought about the beginning of the journey, not the end.

It was more important to have something than to be someone, but nowadays we have started to think differently and to change some routine behaviors that we didn't even notice that we had. One day I asked myself: why do I continue to use disposable pads, if we have other sustainable alternatives?

In the end I believe that over the years we will be more and more conscious and someday, this kind of thought won't exist anymore. It will be a natural behaviour.

To help it to happen, I believe that brands have a big task: think beyond the customer's journey and start to design solutions for the next phase of the journey: the opportunity to reuse or to sustainably dispose or recycle.

Maybe we can start a movement for conscious capitalism. I'm happy to see brands that are already bringing some sustainable and impactful solutions to think beyond simply selling.

Renata Cardetas
Senior Planner, dentsuMB Brazil

WHAT IT MEANS FOR BRANDS

THE POWER OF THE PIVOT

We have a once in a generation opportunity to fundamentally pivot from business models with a heavy environmental footprint to those with a much more sustainable model; from consumption to circularity, from ownership to access, from physical to virtual.

WHERE BELIEF MEETS BEHAVIOUR

These pivots require not only the intelligent and empathetic experience design needed to enable sustainable behaviours, but the powerful emotional hooks needed to inspire and motivate change. We must make behaviour changes aspirational and desirable not punitive or onerous.

FROM COMPETITORS TO COLLABORATORS

Making systemic change possible will require new networks of allies and collaborators, even among former competitors, to create the infrastructure needed to support electrification, circular commerce and a host of other changes.
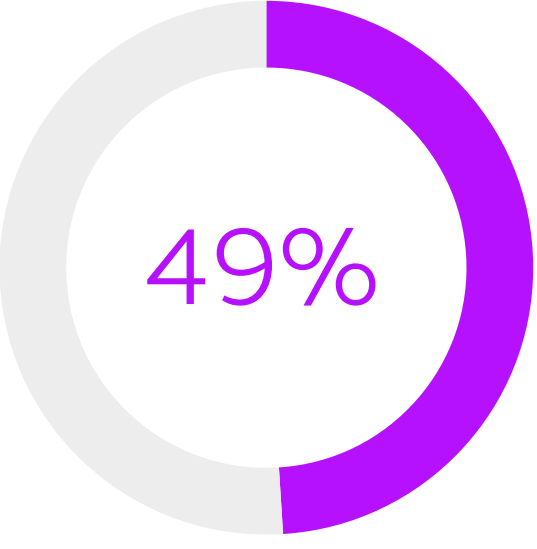
A LOOK AT THE NUMBERS

81%
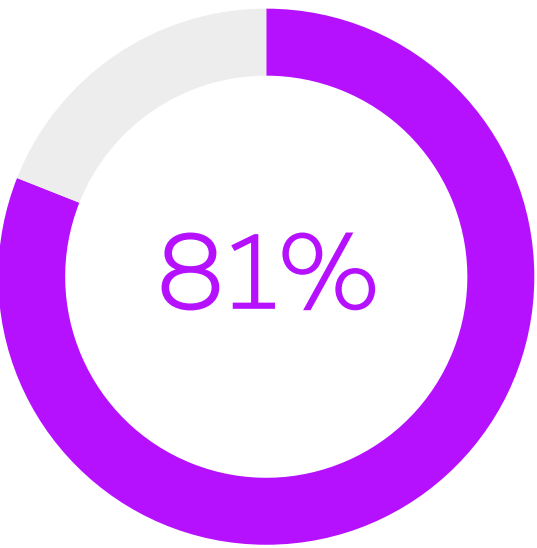
CMOs agree that their business will make a fundamental pivot in response to climate change.[35]

83%
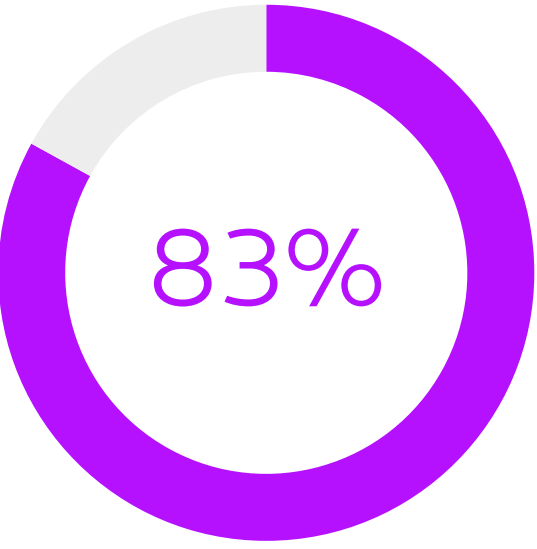
Agree sustainable change is only possible through collaboration across industry, policy makers and consumers.[36]

49%

Agree that lack of collaboration is the biggest barrier to sustainable change.[37]

/ 03   CONSCIOUS DECOUPLING

GENERATION "ALSO ME"

01   02   03   **04**   05
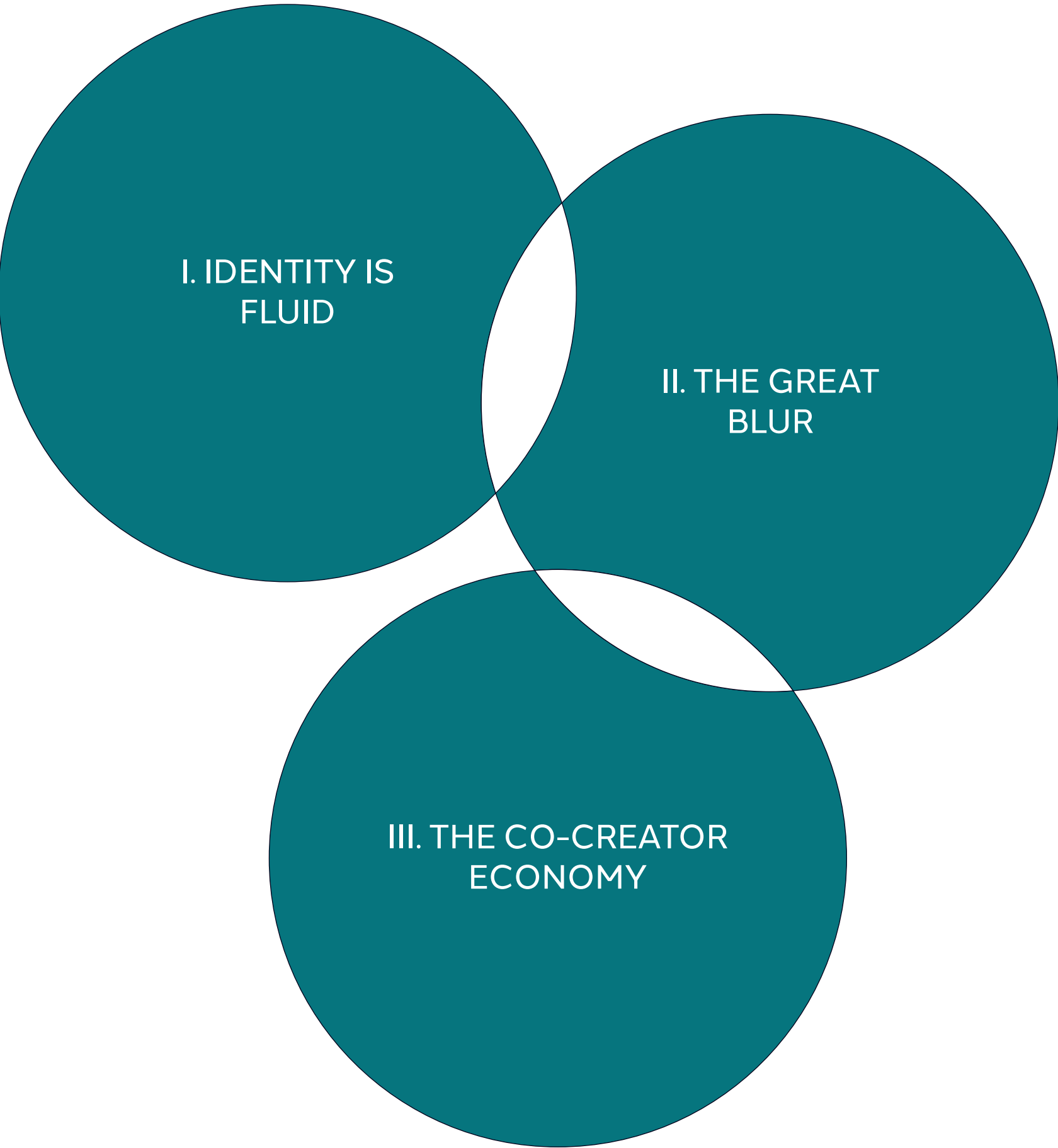
4. GENERATION "ALSO ME"

The fourth trend we see within the great decentralisation is the rise of Generation "Also Me".

Identity is Fluid for a generation who see no boundaries or binaries in how they define themselves, who seamlessly blur genres and formats in how they consume content and how they expect brands to collaborate.

Who expect brands, formats and channels to cross-pollinate at the pace of a generation raised on memes, in our new Co-Creator Economy.

Generation "Also Me" are the most multi-cultural generation in history, and the generation most at ease with non-binary approaches to gender and identity.

They expertly curate personas across platforms and happily embrace contradictions.

I. IDENTITY IS FLUID

II. THE GREAT BLUR

III. THE CO-CREATOR ECONOMY

GENERATION "ALSO ME"

HOW IT STARTED ➤

Generation Selfie: Carefully curated and consistent personas designed for the feed.

HOW IT'S GOING ➤

From Insta to Finsta: A generation happily embracing and managing multiple aspects of their identity, from the more aspirational to the more open, honest and authentic.

WHERE IT GOES NEXT

Meme, Myself & I: A generation who comfortably play with genres and identity, blending real and virtual personas, mixing and matching formats and embracing collaboration.

I. IDENTITY IS FLUID

This is a generation who reject binaries and embrace their whole selves. They are comfortable with contradictions and embrace multitudes.

A YouGov study from June 2020 reported that 52% of American Gen Z do not identify as exclusively straight.[38] 35% of Gen Z-ers in the US know someone who uses gender neutral pronouns,[39] while 48% value brands that don't classify product items by gender.[40]

Between 2018 and 2021 beauty and cosmetics was the fastest growing interest for men, up by 21% according to data from Global Web Index.[41] Nail polish is an important entry point to the category; Estee Lauder have invested in male beauty company Faculty, which launched in 2019 with nail polish but an ambition to progress to foundation, eye shadow and more.

Gen Z are also the most multi-cultural generation in history, proudly embracing multiple identities and heritages. In the US, 1 in 4 Gen Z-ers are from the Hispanic community, versus just 12% of Gen X-ers.

As author Pico Iyer puts it in an interview with the Idries Shah Foundation: "There will soon be 450 million people with many homes, equivalent to the third largest nation on Earth—all that talk of East and West, of here and there and then and now is dissolving."[42] Today's young people can balance national pride while embracing an ever more multi-cultural society.

Young people in China show great interest in their Chinese culture and heritage, demonstrated by the popularity of 'Handscroll Treasure Hunting' on Bilibili. Drawing heavily on traditional Chinese cultural references, this show attracted over 160 million views and over 6 million fans online.[43]

The rise of niche social networks and communities of passion enable sub-cultures to flourish and individuals to embrace multiple identities across platforms.

In other words, consider 'identity' truly decentralised. In place of neat consumer archetypes, businesses must embrace tools and insights platforms that allow them to tune in, in-real time and shape-shift with dexterity in order to meet the needs of their audiences.

PERSPECTIVES FROM A NEW GENERATION:
FLUIDITY IS THE COMMITMENT NOT JUST TO DEFY LABELS, BUT TO HONOR EVERY LABEL YOU HOLD

When I think about how the notion of fluidity manifests in my everyday life, the only word that comes to my mind is freedom.

From the freedom to define what adulthood as a Gen Z Black woman means to me, to the freedom of acknowledging that I can be all things in a world where the default is to be categorized. Fluidity is the vessel that has allowed for my self-discovery and exploration in the highest form - as a young person, as a woman, and as a marketer.

In identity and in life, fluidity is the ultimate breeder of possibility. Just the thought of it can expand your thinking about who you can be in this world and what this world can be. It allows you to question yourself in a time where blind sureness is too often celebrated and it gives you the space to learn in age when "knowing it all" is an illusory expectation. And while fluidity for myself and so many young people alike feels synonymous with detaching from anything that doesn't serve you in the moment, it's also ironically quite the commitment.

It's the commitment not just to defy labels, but to honor every label you hold. And even more importantly, it's the commitment to step outside yourself to not just understand your own layers, but to understand the layers of others who hold identities you don't. And today, I'm not sure if I know anyone who doesn't fit that description.

So, as much as fluidity is freedom, it's also a form of fellowship. The more we allow ourselves to embrace the fluidity of our own identities, the more we find ourselves connected, and that's why it's necessary.

Yet, fluidity doesn't just play a role in my identity. It's also the largest influence of what I choose to do, how I choose to define it, and how I let it confine me - if at all. For too long, I thought who I was had to be rooted in what I did from the hours of 9-5 (and I think a lot of other people thought that too). But, owning my fluidity meant recognizing, "Yes, I'm a strategist, but I'm also a writer, podcaster, and at my core - a student of life". And if any minute that changes, it's not something that should be frowned upon (like so often in the past), but should rather be a cause for celebration. In a world where shapeshifting offers more opportunity than staying stagnant, why should we have to choose?!

So, if I had to boil it down, the idea of fluidity isn't just a trend, but rather a general awakening of the younger generation that is making room for people to be more of who they are, however they define it.

But whether you're young or seasoned, stuck on labels or embracing the grey, ask yourself, if there were no rules, no bounds, or no boxes to subscribe too, who would you be? And if the answer looks different than who you are today, you might want to reconsider the role fluidity plays in your life.

Skylar Motley
Associate Strategist, 360i, US

II. THE GREAT BLUR

This generation, and those to come, see no boundaries in how they communicate, connect and engage with commerce, content and experiences.

They navigate serious and silly, playful and profound with ease, mixing and matching culture with the fluency of a generation raised on memes.

"Genres dissipated when the social, cultural, and economic status they signaled disconnected from the way consumers signaled their taste, status, and identity. No one on the Internet speaks in genres. They speak in memes, references, and remixes. This language of boundary-crossing and cross-pollination breaks down genres by default: it takes elements of different genres and turns them into a new cultural output" - from style authority High Snobiety's recently authored a report on "Post-Genre Fashion Future."[44]

TikTok can be a platform for political activism, a beauty tutorial can capture an important social message, financial advice is picked up on YouTube videos.

Take the 'FinTok' community - swathes of young people gleaning their financial (and investment) advice videos from videos tagged #PersonalFinance -with 4.4bn views and #stocktok -with 1.4bn views.[45]

We also see deft use of apparently frivolous platforms to make serious points. TikTok user Ariam created a series of beauty tutorials which became an important lesson on Black History Month.

77% of users say TikTok has helped them learn about social justice issues and politics[46], with 54% saying they have discussed issues with friends and family after hearing about it on the platform.[47]

Similarly, our team in dentsu Webchutney created a powerful campaign combatting domestic violence by using YouTube's Report button as a key piece of functionality.

Alongside TikTok, Twitter, Snapchat and the Meta-owned giants individuals continue to supplement (or even supplant) their social diet with niche community platforms that allow for less public, less performative sharing whether it's Muze evolving linear interactions into cut-n-paste collages or Zebra allowing people to casually call each other if they are already on the app.

In this world where formats and platforms are blurring, our team at dentsu Webchutney asked themselves, what if we combined a cookbook, a podcast and a delivery app?

OUR WORK: THE BETTER HALF COOKBOOK

Cookbooks have been around since 4th Century AD, and for over 1,600 years, they've been written assuming it's only one person who does the cooking: a woman.

To bring equality to the kitchen, dentsu Webchutney worked with Swiggy Instamart to launch "The Better Half Cookbook," a one-of-a-kind cookbook split into two halves, which gives partners equal cooking responsibilities at meal time.

News reached 100M people across six countries, increasing brand queries by 51%, engagement by 14% and garnering $1.8M in earned media. "The Better Half Cookbook" sold out in four days, increasing trials by 13%.

III. THE CO-CREATOR ECONOMY

Within this cultural context, no collaboration or co-creation seems too unlikely or disjointed.

This is a generation who instinctively welcome collaboration and co-creation, no matter how far-fetched. For them, it is entirely credible for Gucci to partner with North Face, and for both parties to embed that collaboration within the Pokemon Go experience.

Brands and ideas are iterative, designed to be connected and cross-fertilised. Coming of age in the world of open ecosystems, where virtual worlds collide and cross pollinate, it is entirely logical that Balenciaga should partner with The Simpsons, Oreo with Supreme or McDonald's with K-Pop phenomenon BTS.

Whereas once these partnerships might have felt like a poor or even damaging brand fit, in a decentralised world businesses are expected to demonstrate their adaptability to changing audiences. The ability to flex, experiment, collaborate and even partner with competitor brands in pursuit of new ideas has become an attractive attribute to audiences hungry for new stimulation.

Unsurprisingly luxury is leading by example. This September, two 'rival' cult fashion houses - Fendi and Versace collaborated on a 'designer' swap collection, Fendace, with the legendary Donatella Versace designing for Fendi and Kim Jones and Silvia Venturini-Fendi designing for Versace.

On the streetwear level we've seen high level collaborators hand over their IP to the audience-proving remixing is now a feature, not a bug. The late and much missed designer-polymath Virgil Abloh shared over 40GB of work files from previous Off White x Nike collaborations on a public domain.

Kanye West released a hardware MP3 player inviting fans to customise their listening experience of his latest album DONDA via four touch-sensitive 'faders' where people can mix and match stems from the album as well as songs from their own collection.

Opening up previously protected assets for consumers to express their own creativity is a valuable new engagement stream for brands.

Similarly, our 360i agency have kept OREO at the forefront of youth culture through a series of partnerships and collaborations to keep the brand fresh and relevant, while also creating highly desirable limited edition product that builds direct relationships with our audience. Partnerships to date have included Game of Thrones and Pokemon.

OUR WORK: OREO X POKÉMON

360i knew that OREO and Pokémon, two brands that are centered on discovery and adventure, were ripe for a collab.

Pokémon fans love exploring and collecting the wide variety of Pokémon types as much as OREO fans love finding and trying everything new from OREO.

So we brought these two fandoms together. Our cookie designs pay tribute to some of the most beloved Pokémon with 16 unique cookie embossments — but just like in the Pokémon world, some OREO x Pokémon cookies are harder to find.

Mew is featured on an extremely limited amount of cookies, and each pack is filled at random, making each purchase an opportunity to find 'em all. We announced the collab on social media with a playfully pixelated animated video crafted entirely out of the black and white cookies, and brought the OREO x Pokémon collaboration to life with an out-of-home art installation featuring a pixelated Pikachu made entirely out of more than 8,000 3D replicas of the Limited-Edition OREO Pokémon cookies.

The rarified scheme has driven the most sales of any OREO limited edition to date.

PERSPECTIVES FROM A NEW GENERATION:
LIVING IN A PARALLEL WORLD

PERSPECTIVES FROM A NEW GENERATION:
COLLABORATIONS RECONCILE CONTRADICTIONS

Gen Z, as digital natives, is a generation that lives in the parallel world and explores personal identity in both worlds. They may have just one name in the real world, but in the virtual world Gen-Z are role playing different parts of themselves with different personalities that are hidden in the physical world.

They are blurring the boundaries of multiple platforms where they fully play and have fun. Now what matters most to them is that whether their desire for expression on these platforms is fully satisfied. For those who embrace diversity and inclusion as well as extensive interests, brand crossovers can always garner their attention in the first place.

Also they would love to share their own perspectives and feelings towards every brand experiences and interactions they are engaged, which generated the most direct feedbacks for any brand marketing.

I see myself as a person who does not seek to be defined in just one style, because I prefer to transit through several ones. This thought is what shapes my shopping preferences; I connect with different experiences that express different aspects of my personality.

Collaborations in general are a great way to express this idea. For example, here in Brazil a famous department store has partnered with one of the world's leading luxury brands which sparked my interest because of the contrast and connection between the popular and the classic.

These co-creations allow me to quickly transit through different styles. This also happens when a brand and an influencer I follow create something together. By buying the products shaped by these partnerships, I'm seeking the possibility of incorporating the sometimes very different characteristics of both sides of the partnership in a single purchase.

Aurora Cao
Storyteller, Dentsu Z, Creative, dentsu China

Geovana Lourenco
Planner, dentsuMB Brazil

PERSPECTIVES FROM A NEW GENERATION:
AN EMPIRE FROM AN INSTAGRAM POST

The very strong identity of a generation without binary identifications has always seemed to me to be the (positive) paradox of GenZ.

Uniqueness and fluidity are certainly the hallmarks of the youngest, who are continually looking for something that makes them free from the canons pre-imposed by those who preceded them: labels are narrow and those issues that to their parents (but also to those who are only a few years older) seem superficial, are for this generation the basis for rebuilding a society up to their expectations. The dialogue on gender and inclusion has never been as lively as it is today.

These, in my opinion, are the salient points that make Generation Z a generation with such a strong identity. I personally admire the absence of fear in affirming their ideas, their subcultures. Compared to our Millennial friends, who are decidedly more disheartened about the future and about institutions, GenZ have grown up inspired by a generation of creators, who have shown us that an empire can be built from an Instagram post.

This transformation has allowed young people to make pragmatism their own starting point. Their opinion is something to be shared with others, seeking an open dialogue. They live their everyday lives on social media and this brings them very close to one another, creating digital connections that feel more real than ever. They are present across all social platforms, but they have a special regard for the most immediate (in Italy, in this moment, Generation Z is Tik-Tok centric) which facilitate the elimination of barriers and the birth of the always on creator society.

If GenZ ask a question, they require an authentic and well-articulated answer; their expectations of brands are high. Social issues fascinate them and they are very committed to issues of inclusion, diversity and sustainability. They do not tolerate discrimination. In this scenario Generation Z expect to be supported in their battles by the brands they love. They believe in brands who truly reward uniqueness, celebrating diversity and setting new, inclusive beauty standards. Social-washing is not allowed, in any shape!

Most of all they are skilled buyers, with a higher purchasing power than the young people who preceded them (also thanks to the bold use they make of social media, which often generates them a personal income) and they know very well their "value" as consumers.

For this reason they carefully observe a brand's behaviours and are not afraid to abandon a brand if the experience fails to live up to their expectations.

Summing up, what Generation Z expect is a new way of communicating, one which is grounded not only in advertising but in action. Increasingly, brands will need to know how to fit into the gap between Gen Z and the generations that came before, smoothing out the generational conflicts and expanding dialogue. Not a Utopia, but a path to be built with a tolerant and patient attitude.

Giulia Alleonato
Digital Strategist, Storylab, Italy

WHAT IT MEANS FOR BRANDS

A LOOK AT THE NUMBERS

CULTURAL FLUENCY

As an instinctively diverse and multi-cultural generation comes of age, brands must engage with diverse communities to build robust cultural understanding. Conventional research and insight tools can too easily encode unconscious bias.

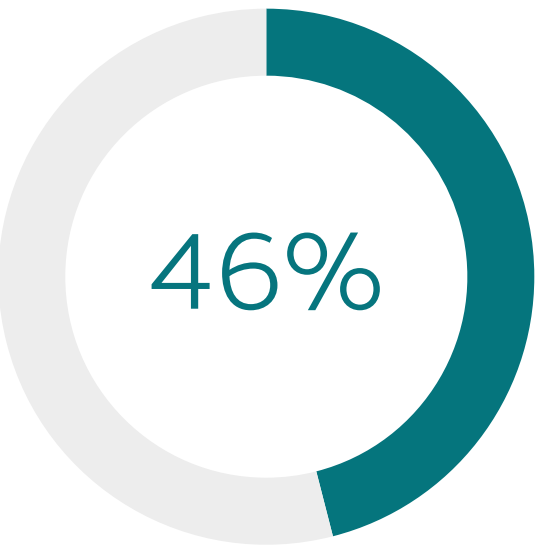**46%**   Of Gen Z-ers agree "there is too much pressure to be perfect in social media".[48]

BRAND MIS-FIT

Conventional considerations around brand fit feel obsolete in a world of ever more unexpected collaborations. The mis-match is in some cases the message, yet while different visual styles and codes are fun to play with, core brand values must be preserved.
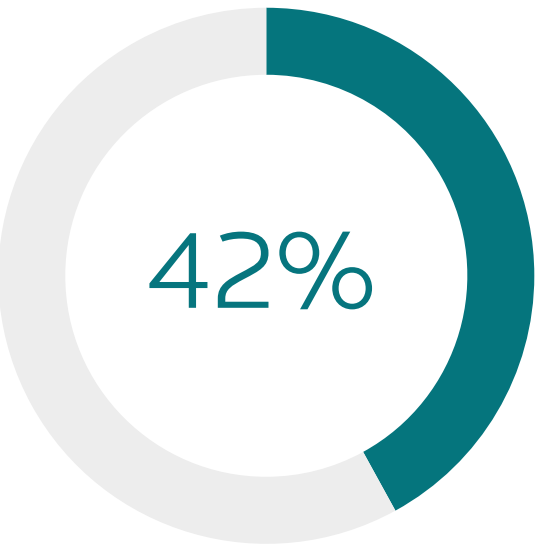
42%   Agree that "people should show more of their real selves on social media".[49]

PLAY WITH PLATFORMS

Modern entertainment platforms have huge flexibility baked in; the only limit is the brand's imagination. The simple playlist can be used to tackle road safety, the "Report" button to escalate important social issues, a TikTok video to tackle anything from Black History to investment advice.
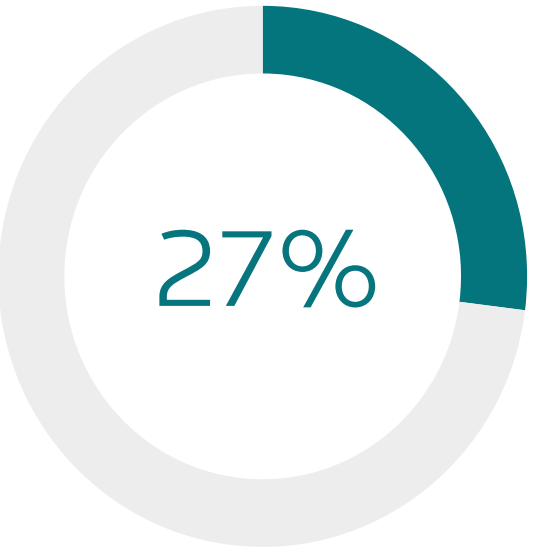
27%   Of the Gen-Z workforce are turning to social media for professional development and networking opportunities.[50]

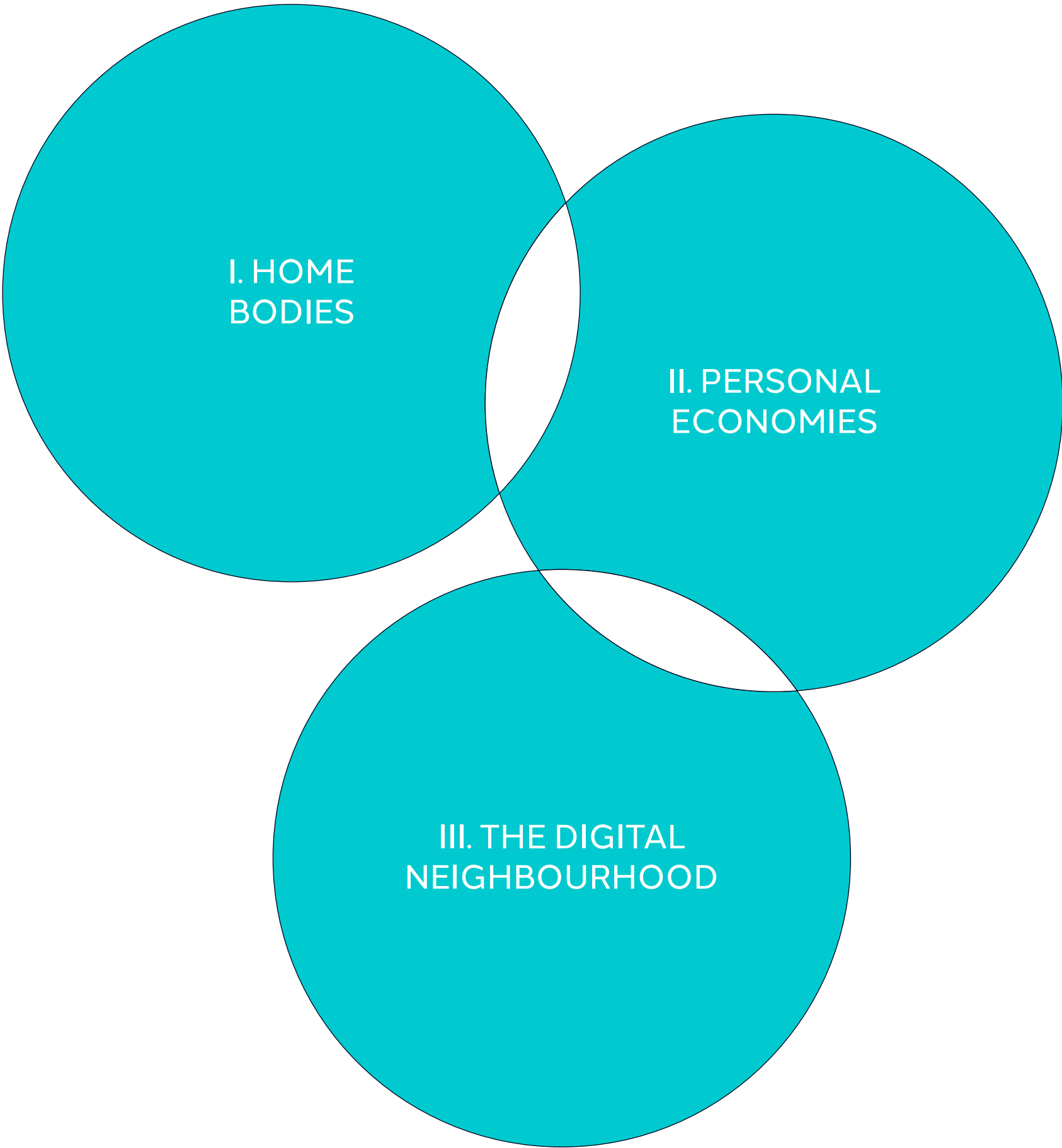# PERSONAL BUBBLES

01   02   03   04   **05**

5. PERSONAL BUBBLES

In a world of deep uncertainty, where so many central sources of authority seem less relevant, while some seek powerful online connections we see some consumers seek to retreat into smaller and safer physical spaces.

The body, and the data it generates becomes a fixed point of truth and security in an unstable world. We see increased emotional investment in the home, alongside an anxious desire for self-sufficiency, sparking increased engagement with categories such as DIY and gardening.

Spending more time at home, we have rediscovered the power of the neighbourhood and the lure of all things local. New platforms are accelerating and reviving old neighbourhood customs, such as the food sharing app Olio, creating a Digital Neighbourhood where I can borrow a real cup of sugar from a virtual neighbour.

I. HOME BODIES

II. PERSONAL ECONOMIES

III. THE DIGITAL NEIGHBOURHOOD

PERSONA BUBBLES

HOW IT STARTED →

Self Sustaining: Lockdowns across the world dramatically accelerated the desire for self-sufficiency sparked by rising climate anxiety. We learned to keep an anxious eye on our health and to stock the freezer or tend the garden against further disruptions.

HOW IT'S GOING →

Home Together: As economies around the world emerge from lockdown, many still remain wary of crowds and invested in the home as sanctuary, movie theatre, cocktail bar and gym. Our expectations of in-home experiences have been transformed.

WHERE IT GOES NEXT

Here comes The Neighbourhood: Compelled to stay home, we rediscovered the power of the neighbourhood and the joy of local, with new technologies accelerating old customs and traditions.

I. HOME BODIES

The body, and the wealth of data now available on every aspect of our wellbeing becomes a source of certainty and control in a volatile climate.

With national healthcare systems overburdened by the pandemic we see new players enter the space with innovative, tech and data enabled propositions. We also see increased comfort and adoption with remote or telemedicine.

As gyms became less accessible, we saw a rise in ever more sophisticated home fitness systems. Sales of home fitness equipment more than doubled in the US in the peak of the pandemic, reaching $2.3 billion between March and October 2020.[51] Meanwhile the Talent Hack platform, designed to empower the fitness creator economy by facilitating payment, scheduling, and communication has raised $17m in funding.[52]

Next generation wearables are developing extraordinary predictive capabilities: In recent studies both FitBit and Apple Watch demonstrated the ability to detect Covid 19 before the patient became symptomatic.

Apple's Wearables, Home and Accessories division outperformed both Mac and iPad sales in Q3 of 2021, rising to $8.8 billion in Q3 alone.[53]

As wearables evolve and become smarter and less intrusive, they may increasingly act as a bridge between the individual and the healthcare system. As Gartner says: *"As device makers focus on improving sensor accuracy, the performance gap between medical and non-medical-grade wearables is closing, driving growth in multiple wearable devices categories."*[54]

On the flipside the rise of personal tracking has potential to lead to increased fragmentation and privacy challenges.

Many businesses have unexpectedly found themselves in the business of healthcare data. Supermarket chains, concert venues and neighbourhood cafes alike are suddenly in the possession of healthcare data, from vaccination status to temperature. Whilst activating in the health and $1.5tn[55] wellness market offers attractive new opportunities it also brings a host of sensitivities to navigate or else face considerable backlash.

Alongside matters of data privacy businesses will have to deduce where, if at all, they are legitimately placed to activate in the healthcare space. Like-minded, content-led partnerships feel on safe ground. Earlier this year Whole Foods grocer partnered with meditation app Headspace to develop a series of meditations focused on mindful shopping, cooking and eating alongside an Instagram Live recipe series, Food for Mood.

OUR WORK: MARSHMALLOG

Created as a prototype by Dentsu Japan, this IoT stress toy accepts your feelings and then records the moment.

A feature that meditation and squeeze toys have in common is that they both enable people to control their focus. Both are noteworthy as methods of self-management for modern people overwhelmed by social media, multitasking and other environmental stressors.

Marshmallog, the internet-connected squeeze toy you can't stop touching, uses a gyro sensor and flexible pressure sensors to measure touch and timing.

The concept involves the use of biofeedback in the form of sound and video to facilitate enjoyable mindfulness training. The measurements recorded can be reviewed using an app.

II. PERSONAL ECONOMIES

Our homes have become our offices, our cinemas, our bars and restaurants over the course of the pandemic. We see significant investment in home décor, home entertainment systems and ever more sophisticated remote and virtual entertainment experiences.

In parallel, we see an increased desire for self-sufficiency and for a connection with the earth to preserve our mental health and wellbeing.

3.5M UK consumers took up gardening for the first time during the pandemic.[56]

Whilst live experiences have returned, new kinds of experience designed especially for the home have also increased in popularity. Streaming services have redefined 'event TV' and savvy brands are making their way into consumers' lives by enhancing the in home experience.

As major studios experimented with simultaneous releases across movie theatres and in home streaming platforms during the pandemic, expectations among consumers of near-simultaneous releases for the future were raised. While blockbuster releases such as Bond lured some movie-goers back to the multiplex the window between theatrical release and premium streaming services is narrowing.

Immersive technologies came into their own in the domestic space born out of necessity during the pandemic. Projects like HELD by tech studio Bitter Suite promise a "multi-sensory concert in a box" from the comfort of your own home. Users receive a 'Journey Box' containing taste and scent samples, a blindfold, a login to an online portal and instructions for props to find around the home. Digital content and sensory stimulus transform family gaming and entertainment.

Delivery services will continue to generate powerful new brand engagement touchpoints with the consumer be it through packaging or value-added services. During lockdowns, Isobar's client KFC used delivery packaging as a medium to communicate the brand's efforts to reduce the risk of Covid contagion, marking it with 'Contactless Delivery VI' and the temperatures of the service team.

Data from Ernst and Young's Future Consumer Index reveals that 52% of respondents globally are much less likely to go out unless they did pre-pandemic.[57]

This ongoing nervousness around going out has fuelled a rise in home entertainment such as pre-mixed cocktails. Bacardi acquired "pre-batched" cocktail company Tails in 2020, while Suntory Beam acquired pre-mixed cocktail company "On the Rocks."

Meanwhile Waitrose have launched a "Wine Tasting at Home" service offering wine and cocktail tasting kits, including virtual advice, tasting notes and mixology advice from the experts.

JUST LIKE A SLATE OF HOME-FRIENDLY HOBBIES LIKE BAKING AND KNITTING, GARDENING HAS SEEN AN INCREASE IN POPULARITY IN THE LAST YEAR.

A SURVEY FOUND THAT A QUARTER OF RESPONDENTS STARTED GARDENING BECAUSE OF THE PANDEMIC.[58]

LAUREN ARATANI
THE GUARDIAN

OUR WORK: SUNTORY

During the pandemic, we knew consumers were seeking new and stimulating experiences at home.

Dentsu Japan partnered with Suntory to create Suntory's first ever meal kit experience: "table trip". The table trip kits created an extraordinary dinner experience at home, as if you were traveling abroad. Every kit contained a meal kit and a drink from a different country, together with a taste of local culture created in partnership with Elle Gourmet.

The meal kits provided authentic local dishes, bringing back memories of trips people had taken in the past, or inspiration for places to visit when travel opened up again.

PERSPECTIVES FROM A NEW GENERATION:
THE RISE OF THE SINGLE ECONOMY

Since the outbreak of the pandemic, young people have developed new perceptions of the inner self, home and the external world.

Young people choosing to be single becomes a hot societal issue. They enjoy being alone and value their own needs, both in terms of physical health and spiritual fulfillment, and they are never stingy when it comes to pleasing and rewarding themselves.

In the Chinese market, those used to be defined as rebellious young people in the eyes of their parents turn out to be the most conscious group of people who wear masks to keep healthy during the pandemic.

Online classes, working from home, and online grocery shopping are still part of the norm post pandemic. At the same time, single economy is on the rise with "product/service for solo use" getting popular among young people.

For young people, home is where they can unleash their nature and an energy recharging station. They aspire to travel far away, but they are also good at discovering local cultures, experiencing, and caring for changes in their communities. Previously, befriending in the digital world might be a popular way of socializing only for young people, but nowadays, it is more universal and common for everyone. Meanwhile, interactions such as likes on social media platforms has become a kind of social courtesy rule in a certain sense.

Aurora Cao
Storyteller, Dentsu Z, Creative, dentsu China

PERSPECTIVES FROM A NEW GENERATION:
HOME REFLECTS MY IDENTITY

My home has always been my sanctuary. However, having to change cities quite often - to study, work or escape from the pandemic - this safe place has needed to change multiple times. That made me think about what it takes to make somewhere a place for my well-being, a place which I can truly call 'home'.

Most of all, it needs to reflect my identity - If my favourite moment of the day is watching movies and documentaries, my living room must have great sources to do that. It doesn't matter if I don't have the latest smart speaker if it won't make me feel more myself.

That also resonates with outdoor experiences. If I have the opportunity to go out, I'll think twice if it could be as good as making that happen at my place - It could be just as fun and much more comfortable.

It doesn't mean I'm not interested in experiences in nature, travelling or meeting my friends. It's just that I enjoy my own space so much that I value even more the moments when I choose not to be in it.

Flavia Cassias
Senior Planner, dentsuMB Brazil

III. THE DIGITAL NEIGHBOURHOOD

As we have travelled less, we have rediscovered the strength of local and the power of the neighbourhood.

Old traditions have been revived, powered and accelerated by new technologies. Communities have come together to take action and make changes far from conventional centres of action.

Many of these community initiatives are also instrumental in driving more sustainable behaviours; a study from the Institute for Public Policy, cited in The Guardian, shows that community projects, often instigated with the intention of tackling poverty, have the additional benefit of reducing emissions.

Initiatives such as Repair cafes or renewable energy schemes, such as Bristol's Energy Cooperative, a "people owned power station" aim to offer more affordable solutions for the community, by the community.

The report concludes: "We recommend a major 'paradigm shift' for a new approach to tackling the climate crisis by facilitating 'local climate commons' and putting communities at the heart of addressing the climate crisis." [59]

We Buy Malaysia is a social e-commerce platform inviting communities to group buy in bulk to benefit from discounts and better value by brokering sales between the producer and the consumer. They also help to empower smaller vendors with support in tech and marketing. India's Otipy delivery app promises to deliver "farm to fork" in 12 hours connecting farmers with consumers. Items are quality checked and packaged in sustainable materials whilst predictive algorithms offer "best prices" to the consumer and help prevent waste.

In Europe, the OLIO app connects neighbours with neighbours and local businesses to redistribute surplus food and household items to provide affordable groceries to those that need it and avoid waste.

Neighbourhood concepts are also manifesting within luxury. Boston-based Alchemista is a novel food delivery concept where premium restaurants deliver food in temperature-controlled lockers within apartment buildings.

Our teams in dentsu Japan have piloted a virtuous food cycle in partnership with Kawasaki city in which each household makes compost using a food waste disposer which is then shared with local farms in the city that grow vegetables. The partnership is experimenting with the potential of Web 3.0 technologies to track and reward individuals' participation in community good.

In parallel, we also see a strong desire for local connection emerging, both in the food category and more widely. Our teams in Isobar Taiwan worked with PXMart, Taiwan's largest grocery retailer, to support local farmers through the pandemic as exports become difficult and huge amounts of food were being wasted. The "Eat Taiwan" campaign heroed the unsung champions of Taiwanese produce and led to a +30% uplift in the turnover of fresh food.

WHAT IT MEANS FOR BRANDS

WELLBEING IS EVERYONE'S BUSINESS

As more and more of us recognise the importance of taking personal responsibility for our health and wellbeing, every brand will be, to some extent or another, in the wellbeing business whether mental, physical or emotional. The challenge will be to identify credible spaces to play both from a brand perspective and the perspective of responsible data stewardship.

EXPERIENTIAL COMES HOME

While the experiential sector has struggled in the recent months and years due to Covid-imposed restrictions, we increasingly see a demand for highly creative and immersive in- home experiences. As restrictions begin to lift around the world consumer expectations around in home experiences have been raised and brands which are able to provide delightful interactions, whether through packaging, remote experiences or exclusive content will thrive.

POWER TO THE PEOPLE

Both on and offline, we see the power of community flourishing, turbo charged by the urgency of the pandemic and a new era of sharing technologies. Brands should strive to empower and connect communities of interest to do more together than they can alone.

A LOOK AT THE NUMBERS

$660B — The digital health market should reach nearly $660 billion dollars by 2025.[60]

$150B — The size of the global food delivery market.[61]

$43M — In investment raised by the Olio app.[62]

IN SUMMARY

Across the world we see a great decentralisation in progress. A dismantling of old centres of authority and a forging of new connections. It's unsurprising perhaps that at a moment when we are beset on all sides- by a global pandemic, a climate in crisis and rising inflation-we should seek escape.

Escape to virtual worlds and virtual identities that feel as real—perhaps more real—than our physical existence. Escape from the constraints of the office or the city, perhaps from the world of the 9-5 entirely. A retreat into safer spaces like the home, the neighbourhood and the local.

Yet we see not only escape but reinvention.

Cryptocurrency, NFTs and blockchain are creating entirely new models for ownership and investment. A luxury economy designed for a virtual world is emerging. Collectives are coming to the fore and making audacious plays for access and autonomy.

A generation of marketers are all too aware that their business must fundamentally pivot in response to climate change and are preparing for the challenge.

Ready to pivot from ownership to access, from automotive to mobility, from a consumption-based economy to a circular economy.

Meanwhile new communities are emerging, reviving and turbo-charging old neighbourly traditions through the power of technology.

In this New Worlds Order, brands and businesses can play a powerful role, mindful that the future will belong to those who connect brands to culture and businesses to communities.

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