

A surreal cityscape at night. In the center, a large, dark, angular structure with a wide, flat top and a thick, twisted trunk stands on a grassy area. A glowing pink cherry blossom tree is positioned in front of the structure, its branches reaching out. A simple wooden bench sits on the grass in front of the tree. The background is a dark city skyline with numerous skyscrapers, some of which have lights on. The overall atmosphere is mysterious and futuristic.

# A TALE OF NEW CITIES

DENTSU CREATIVE TRENDS 2023



**2023 is riddled with uncertainties. War, inflation, crisis upon crisis. As an industry, there are huge challenges coming our way.**

But there are also many certainties. Creativity wins. Emotion wins. Innovation and collaboration wins. Challenging times are no time for business as usual.

Our DENTSU CREATIVE trends report explores the challenges coming our way but also the opportunities for brands with the courage and imagination to embrace a new modern creative toolkit and create culture, imagine a better future and make it possible.

**FRED LEVRON, GLOBAL CCO, DENTSU**



## **At the end of 2022, it was hard to escape the feeling that eras and empires were ending—or beginning.**

Around the world we saw immense volatility, as the cost of living spiralled, conservative policies challenged progressive social agendas and energy instability became all too real.

As 2023 begins, we see both alarming steps backward as a society—with talk of black outs, rationing and hyper-inflation—and green shoots of hope. Perhaps most exciting is the sense that individuals and communities are writing their own narratives, rejecting a sense of top down, homogenous cultural influence.

Our predictions for 2023 acknowledge the tensions, volatility and struggles facing society today and, on the flip side, the opportunities, tools and platforms that exist to enable communities to build the worlds they want to see.

**PATRICIA McDONALD, CHIEF STRATEGY OFFICER, DENTSU CREATIVE**



# DENTSU CREATIVE TRENDS 2023: A TALE OF NEW CITIES

***IT WAS THE BEST OF TIMES, IT WAS THE WORST OF TIMES.  
— CHARLES DICKENS, A TALE OF TWO CITIES***

Traditionally, trend reports point the way forward to a bold and exciting new future. Where innovation unlocks exciting new possibilities for humanity, and where we move inexorably and inevitably forward. As we look towards 2023 it's hard to escape the sense that perhaps progress is not always as inevitable as we've been led to believe. That in many aspects of our lives we are perhaps sliding backwards; or at least finding a new equilibrium between the new and the old, technology and humanity, innovation and tradition.

The brave new world of the metaverse has been rocked by slower adoption than anticipated and by worsening outlooks for cryptocurrency. Cost of living crises are impacting consumers across the globe and amidst talk of rationing and power blackouts. Not even the most advanced economies, it turns out, are endlessly resilient in the face of war, climate change and soaring inflation.

So where do we turn for optimism as we look to 2023? It turns out, we need to look in new places. Top down sources of authority and inspiration are less relevant in a world where younger generations can see all too clearly the havoc their elders have created. We see new patterns of influence emerging, in a trend we call "East meets East" for example. Consumers in Asia Pacific no longer take their influences from Western culture but are inspired by the rich cultural differences they see across the continent-with the cultural influence of South Korea continuing to accelerate. We see consumers reaching out to their peers for advice; seeking financial, wellbeing and life advice from one another versus traditional expertise. Amidst a darkening financial and economic context we see consumers seizing and treasuring small moments of joy and respite, embracing opportunities to simply be, and to be together.

Our 2023 trends are designed to reflect this shifting balance: the very new and the very old, the embrace of technology to propel us forward and the desire to step back and disconnect. The sense that progress and regression, optimism and anxiety are more finely balanced than ever. The best of times and the worst of times.

We draw on insight and inspiration from talent across the Dentsu network, providing rich diversity of perspective: some more optimistic, some less so. All striving to make the world a better place.

# BRANDS AND BUSINESSES IN THE BALANCE

12 TRENDS FOR 2023 REFLECTING **SHIFTING SANDS**  
FOR BRANDS, BUSINESSES AND CULTURE.

THE END OF MONOCULTURE

MENTAL HEALTH IN CRISIS

TOXICITY IN TECHNOLOGY

THE GREAT OPT OUT

REBEL WITHOUT A FILTER

HANDBRAKES ON GROWTH

THE QUEST FOR CULTURE SHOCK

THE JOY IMPERATIVE

META DIVERSITY

THE GREAT OUTDOORS

AI-DENTITY

THE IMPERATIVE FOR GOOD

**THE END OF**



**MONOCULTURE**

## THE END OF MONOCULTURE

**As new milestones were reached across the world — the end of the Elizabethan era in the UK, the first Gen Z Congressman to be elected in the US — there is a powerful sense of old orthodoxies shifting.**

Top down sources of authority and inspiration are less relevant in a world where younger generations are forced to reckon with the damage caused by previous generations. This generation is looking at the systems and stories they have inherited and are daring to change the narrative.

“This is about understanding the tenets of Cultural Fluency (intersectionality, counter-stereotyping, and nuances), leaning into storytelling, and being mindful of how people are being reflected authentically.” — Aminata B. Sow, Director of Cultural Fluency, US.

Western economies struggling with hyper inflation, cost of living crises, and political polarisation are no longer providing cultural aspiration beyond (or within) their own shores. Trust in authority has reached an all time low. For many young people, it is clear that pursuing their parents' path to affluence is no longer an option. Meanwhile, we see a powerful desire to both subvert old narratives and to create new ones. World-building games such as Roblox soar in popularity while a new era of period dramas challenge traditional portrayals of power and privilege.



# THE END OF MONOCULTURE: BY THE NUMBERS

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# 17/27

Year-on-year, trust has fallen in 17 of the 27 countries in the annual [Edelman Trust Barometer](#).<sup>1</sup> Only 36% of the respondents believe government is a unifying force in society.<sup>2</sup>

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# 46%

For the first time, less than half of respondents surveyed in England and Wales identify as Christian.<sup>3</sup>

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# 42%

Currently, only [42% of US adults](#) think it is very (13%) or somewhat (29%) likely that today's youth "will have a better living standard, better homes, a better education and so on" — an 18-percentage-point drop since June 2019.<sup>4</sup>

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# THE END OF MONOCULTURE: WHAT IT LOOKS LIKE



## BUILDING NEW WORLDS

Social platforms are evolving their editing features and their filters into world-building functionality. Earlier this year Pinterest introduced [#Pinterest Shuffles](#), a moodboarding / dream-building collaging function, which has already amassed 27m views on TikTok. Likewise, new social platforms and games are emerging as ways of role playing possible futures. [Somewhere Good](#) is an audio-based social app inviting users to create spaces for their own communities or join existing ones themed around different 'worlds'. Worlds range from the "Sad Girls Club" which is a space to discuss topics around mental health to "AcerandO" for ancestors-in-training.

## RECLAIMING OLD NARRATIVES

The next generation want to rewrite the scripts they've inherited about their history and heritage. [FOMO](#) (Fear Of Missing Out) is a podcast which purports to offer "unfiltered lessons on British history", covering topics that are usually omitted from the curriculum, from media reporting of queer communities to British colonialism. A new generation of academics and explorers are reclaiming an authentic perspective on history and heritage. As Sabrina al-Sadiq, a student at Khartoum University, put it in [The Guardian](#), "it is very important that Africans do African archaeology...the idea that people from the west know best is changing."<sup>5</sup>

## TELLING NEW STORIES

Brands continue to introduce platforms and initiatives for consumers to write their own stories. Converse launched the [Create Next Film Project](#) inviting five emerging creatives to produce a five-minute short with support from entertainment industry experts and mentors including British actor and activist John Boyega.

In the US, [McDonald's Spotlight Dorado](#) project empowers and amplifies Latino voices across different industries.

# THE END OF MONOCULTURE: A PERSPECTIVE

KEELEY ADLER, CULTURAL FUTURIST, US



## WE ARE ALL WORLDBUILDERS NOW

**As 2022 gives way to 2023 — a startling transition for those of us still processing 2020 — we find ourselves in a fascinating moment. Our old narratives are broken, that much is clear; but their new counterparts have yet to be written.**

That kind of liminality is deeply uncomfortable, but it's also uniquely generative. You see, liminal spaces such as ours are double-edged swords. As Anne-Laure Le Cunff [explains](#), they're full of doubt, discomfort, unfamiliarity, and anxiety. But also growth, change, and discovery. "Liminal spaces offer all of the ingredients for creativity." And that's just what this moment needs. So what are we to make of this space between stories? The answer, it turns out, is worlds.

Worldbuilding — the act of imagining, designing, and implementing the world of a story — isn't a new phenomenon. It stretches back into the annals of sci-fi and fantasy, and farther still. But the idea that we might all be worldbuilders? That's a fundamental shift — one that's come about thanks to a confluence of forces. In the context of popular culture, worlds have gobbled up just about every form of media, so much so that the idea of a 'cinematic universe' has become a meme unto itself.

What found the mainstream by way of superhero franchises and video games has given way to a cultural ecosystem where the expansive potential of intellectual property is prioritized above all else. Meanwhile, tailwinds in both fandom and the [creator economy](#) are pointing toward collaboration and ownership. With new tools at our disposal — think: decentralized, niche community platforms; web3 tooling; generative AI — it's increasingly possible for us to create our own worlds around the things we're passionate about.

From web3 [projects](#) like [Loot](#) and [Nouns DAO](#), to activated fandoms around [traditional celebrities](#) and [modern influencers](#) alike, we're watching universes bloom around all sorts of things — with communities of those we may have once considered passive consumers right at the center; not just actively participating but building in earnest. Suffice it to say we've caught the building bug. Whether you look at [Dabloons](#) — a completely player-generated, decentralized game that developed organically among kids on TikTok — or at subcultural movements like those unfolding around [Lunarpunk](#), [Biopunk](#), [Hopepunk](#) and the rest, what you find are communities emerging around shared vision and common lore, cultivating a real sense of ownership over the future of, well, whatever it is.

And when you can catch that feeling in small ways, you start to believe that you can have the same impact on a grander scale, too. What if we spun up a [community of activists](#) to fund the fight for reproductive rights? What if we created a [more humane social network](#), one that wasn't at the mercy of centralized forces? What if we did things differently? What if the world didn't have to look the way it always has? Worldbuilding is becoming one of those words you're going to hear a lot. Yes, brands have caught the bug, too. And yes, we'll hear it applied to little-visited shiny initiatives in the so-called metaverse. But I'd urge us to think about its greater — and far more interesting — potential in a moment like ours.

In this space between stories, what narratives are you writing? What opportunities are you seizing to remake and reimagine?

Given the opportunity to start anew and peer into the future, what worlds will you build?

OUR WORK



## TELLING NEW STORIES FOR VICE

The Unfiltered History Tour was a secret tour of the British Museum created by DENTSU CREATIVE Bengaluru for Vice World News. The tour used Augmented Reality to show the true history behind some of the most priceless and highly contested artefacts within the British Museum. Visitors to the museum were shocked and moved to hear more about the people and cultures the artefacts were originally taken from.

The idea helped to educate 100,000 people, with 35,000+ downloading its accompanying podcast, introducing a new generation to the debate around disputed artefacts. This resulted in 18M impressions, a 40% rise in followers and \$2M in earned media on TikTok, as well as a 49% increase in total impressions on Instagram for Vice World News. The work also won a total of 12 Cannes Lions including a Titanium Lion, and eight D&AD Pencils, including a Yellow Pencil.

# 18M

Social impressions with a 40% increase in followers.

# 49%

Rise in total impressions on Instagram for Vice News.

# THE QUEST FOR



# CULTURE SHOCK



## THE QUEST FOR CULTURE SHOCK

**“Consumers are immersing themselves in culture and language in search of something fresh and completely new.” — Wei Qing Lim, Digital Strategist, Malaysia.**

As young consumers find less to aspire to in traditional cultures, they seek immersion in entirely new cultures, craving genuine culture shock after “lost” months and years held in place. Instead of simply switching off from their everyday consumers today are seeking to immerse themselves in something new, hungry for new stimulation post Pandemic. This opens up new opportunities for countries to build influence via cultural capital or soft power versus traditional routes to power and influence.

The unstoppable rise of Korean culture continues, while across Asia Pacific we see the rise of “East meets East”; the desire to embrace the full richness and diversity of the region for inspiration rather than look West for inspiration.

Meanwhile, in response to the war in Ukraine, interest in the Ukrainian language and culture has soared.

# THE QUEST FOR CULTURE SHOCK: BY THE NUMBERS

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# 50%

(50%) of global travelers want to experience complete culture shock in 2023 – be it traveling somewhere with completely different cultural experiences and languages (51%) or exploring lesser-known cities with hidden gems that aren't already on the radar (30%).<sup>6</sup>

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# 1.3M

Korean has become the seventh most popular language for people to study around the world, while 1.3 million people began learning Ukrainian in 2022, according to language app Duolingo.<sup>7</sup>

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# +370%

Netflix found that interest in Korean dramas in India has increased by 370 percent over the last year.<sup>8</sup>

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# THE QUEST FOR CULTURE SHOCK: WHAT IT LOOKS LIKE



## EAST MEETS EAST

Hallyu or the “Korean Wave” continues to ripple across the world and across every aspect of culture. Korean music, movies, games, fashion and food are becoming a barometer for what’s next. Sabiha Khan, Head of Strategy, Digital Experience, India illuminates, “we’re seeing a real east-meets-east trend as Indian youth get excited about Korean culture, including the food and the language.” The fascination with all things Korean is not just for younger generations either; viewing for K-dramas on [Netflix India increased 370 percent](#) over the last year, while major cultural institutions such as the V&A and LACMA have featured landmark exhibitions on Korean Culture.

## THE RISE OF SOFT POWER

While South Korea is the most obvious example, we can see around the world the gradual embrace of soft power building global influence versus more traditional routes to dominance.

Monocle magazine’s annual [Soft Power Survey](#) shows smaller nations such as Denmark, Norway and Ukraine rising in influence as champions of sustainability, philanthropy and democracy.

## PEER-TO-PEER CULTURE CURATION

As travellers seek out less-trodden paths they are turning to their peers for inspiration and verification.

Earlier this year Google Maps introduced a [Google Vibe Check](#) function that invites users to share hyper-specific insights around unusual destinations. Likewise, [Trippin](#), pitched as a destination guide for the experience hungry Gen Z offers travel advice ‘seen through the eyes of locals’.

# THE QUEST FOR CULTURE SHOCK: A PERSPECTIVE

LUELLA BEN AZIZA, STRATEGY DIRECTOR, UK



**I asked ChatGPT to write this piece for me, and you almost ended up with an article about grass. But unlike AI, people have opinions, and mine is: good riddance, monoculture.**

It had its merits - there was a time when it felt like everyone saw the same movies, played the same albums and had the same reference points in culture. It was a point of connection. Now, when I ask a friend if they've seen this show or heard that album, I rarely expect a 'yes'. After all, we have access to infinite culture, information, and perspectives, at a time when personal branding is currency. So we're all into many different, very different things. That makes the world more interesting. And I suspect that point of connection was always more helpful to marketers than to society.

Gen Z are intensifying the importance of individual, intrinsic expression. While that creates pressure, it also alleviates pressure on the weird, the quirky and the previously marginalised. Now western ideologies' sheen is seriously tarnished, more of us look to the whole world for inspiration - not just on the big issues, like spirituality, but on the smaller ones too: Korean skincare, Chinese streetwear, Turkish dancing.

Of course we'll always be connected by global cultural moments like the World Cup, Fashion Weeks and the Oscars, but now the top layer of culture is thinner, less ubiquitous, because there's so much, so many other moments, that it's impossible to stay in the loop. Algorithms make it much more entertaining to be on the outside anyway. Instead, the expectation is that we have our own unique lens on current issues...and in popular culture it needs to be progressive and inclusive.

Since the cultural centres of gravity have less pull, no longer must you flock to them, for example, by moving to a big city, to feel part of culture. For now, TikTok is that city. And it's a much more candid and imaginative space, where we can explore any number of new worlds. New cultures bring the unexpected, the surprising, the visually arresting: the perfect hook for any media. So culture shock is playing a more important role for any brand or creator vying for attention, in a world where the 3 second hook is king. Especially at a time where you can still become TikTok famous overnight.

It's not just a tactical play. At a macro level, the West is no longer the beacon of ideological superiority it aimed to be in the 00's. The American Dream has an ugly dent in it, so globally, we are hungry for fresher sources of inspiration.

Reinterpretation of old ideas, reclaiming of old narratives and repurposing inspiration from anywhere is anyone's game now, making the job of fashion houses, for example, much harder. Working in fashion in the 00's, buyers had the dream job: going to the corners of the earth to find inspiration that might feel new on the UK high street. Now, they have little chance of the speed of manufacture catching up to the speed of culture.

When there's so much inspiration to draw from, it means that creativity is more important than ever. But not simply from the perspective of "we need more ideas". It's more about the thread that ties ideas together, connectedness, understanding and interpretation. Harder to achieve, but so much more powerful.

# WHAT IT MEANS FOR BRANDS

## 1. UNTOLD STORIES

It has never been more important for brands to understand, engage with and represent untold stories, be that fresh cultural perspectives, insights into niche online communities or more profound challenges to dominant cultural narratives.

## 2. TRUTH IN DEPTH

In the past, we've developed global campaigns to speak to as wide an audience as possible; seeking only the higher order human truths that connect. For a generation coming of age with a profound sense of cultural curiosity, perhaps what matters most is a sense of truth well told. By telling authentic stories of cultures different to our own brands can still find common ground.

## 3. THE CO-CREATION IMPERATIVE

As a generation of builders and co-creators come of age they expect to be invited into the conversation, to build and mould the futures of the brands they have grown up with. This doesn't of course mean any less requirement for brands to have a strong point of view of their own; indeed it is brands with the strongest and clearest foundations consumers will seek to build on.

**MENTAL  
HEALTH**



**IN CRISIS**

## MENTAL HEALTH IN CRISIS

**“Health is almost becoming a kind of entertainment activity in itself with people embracing apps as a support or instead of going to therapy.”**

— Tina Chang, Senior Planner, Taiwan.

Rising anxiety levels fuelled by a bleak economic outlook are powering a mental health crisis around the world.

In China, we see the gamification of mental health and self analysis, while in Taiwan there is a range of drinks inspired by Myers Briggs personality types. Meanwhile Europe is facing a “mental health recession” as post pandemic anxiety meets a cost of living crisis meets an over burdened health service.

Mental health and anxiety, amidst a volatile world, are fuelling trends across every category from interiors to cleaning to food and drink, as consumers seek solace in cocooning themselves from the outside world. In parallel, an epidemic of loneliness continues post Pandemic, the May 2021 American Perspectives Survey finds that Americans report having fewer close friendships than they once did.<sup>9</sup>



# MENTAL HEALTH IN CRISIS: BY THE NUMBERS

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# 1/5

1 in 5 of Gen Z globally say they or someone in their household is suffering from a mental health condition.<sup>10</sup>

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# 50%

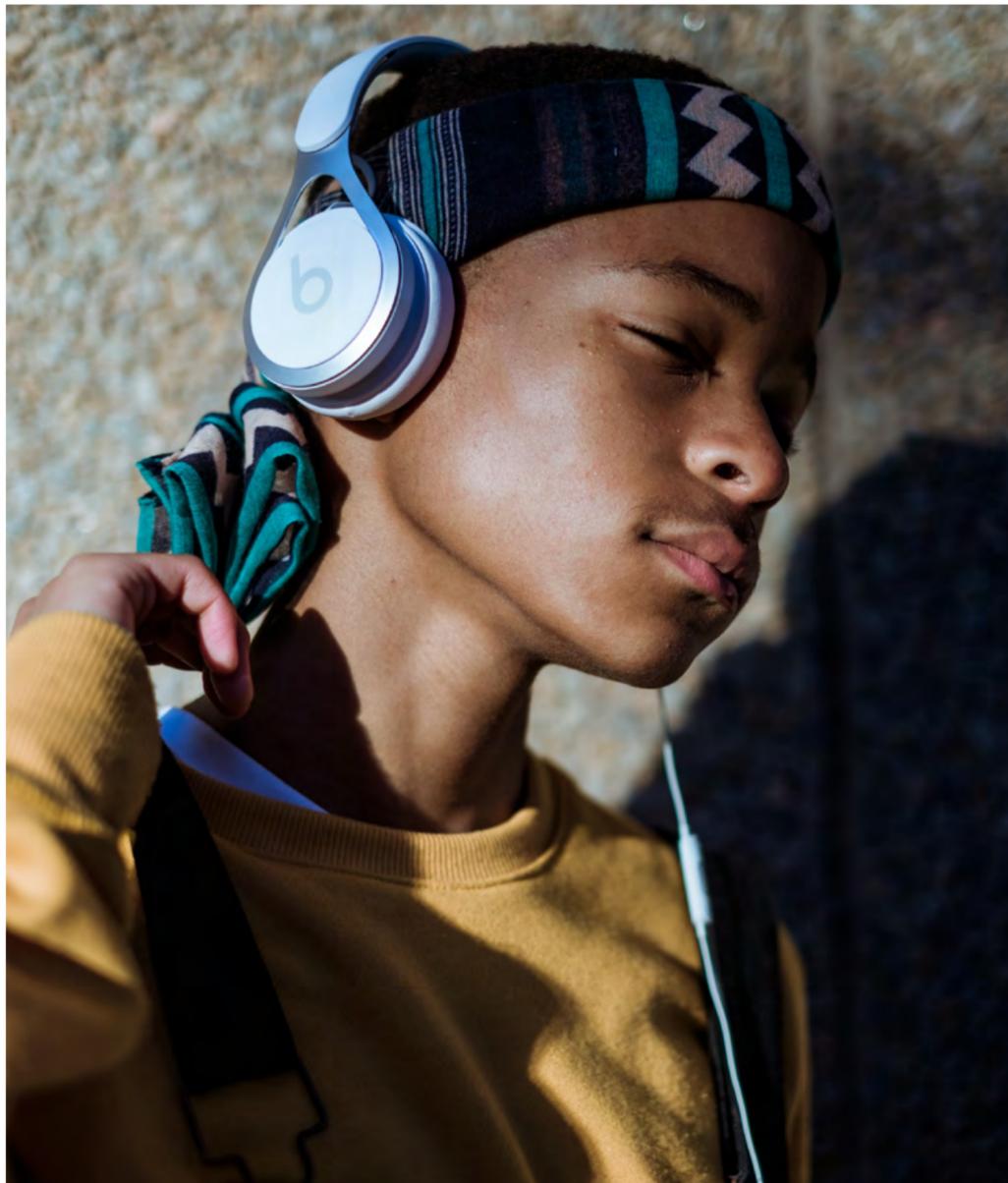
Of Europeans say that "uncertainty" best describes their emotional state, while "fear" "anger" and "frustration" also feature highly in their list of feelings.<sup>11</sup>

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# 60%

According to a [survey](#) across 15 countries, around 60 percent of employees have experienced at least one mental-health challenge at some point in their lives.<sup>12</sup>

# MENTAL HEALTH IN CRISIS: WHAT IT LOOKS LIKE



## ANALYSIS BY AI

As consumers seek to deduce what makes them tick and where they should put their energy they are looking to personality diagnostics to help them hack their well being. [Dimensional](#) is one such app, measuring over 200 personality traits across 10 metrics or dimensions in order to create your unique “Signature” which then offers insights and practical advice based on your personality.

More playful platforms like [Spotify's](#) End of Year Wrapped are increasingly becoming a social media moment.

## IDENTITY-BASED PRODUCTS

The [Myers-Briggs Type Indicator](#) (MBTI), once the preserve of corporate development activities, has become something of an obsession for young South Koreans particularly for dating.

[Paradise Group](#) is a Tourism company offering holiday recommendations based on your MBTI type whilst the [Jeju Beer Company](#) launched a series of cans emblazoned with the letter codes of the 16 personality types.

## POCKET THERAPY

Whilst in recent years tech has been identified as a contributor to poor mental health, on the flipside, consumers are finding comfort and support in pocket therapy especially where traditional health services are stretched.

Thankfully as health becomes increasingly digitised privacy functions are improving to match. The group-therapy app [Chill Pill](#) offers a “world of future friends and better days” but does not permit the sharing of any personally identifying information.

## SELF SOOTHING IN SURPRISING WAYS

In an uncertain world, we sometimes turn to strange places for solace. The [#CleanTok](#) hashtag has over [62 Billion views](#) in TikTok, as Gen Z seek a sense of calm and control through watching others go through the ritual of cleaning house and restoring order.

The link between a physical and emotional sense of order is well documented, with Gen Z taking things to the next level via a vicarious self soothing.

# MENTAL HEALTH IN CRISIS: A PERSPECTIVE

GIULIETTA VENTO, STRATEGIST, US

**Our society is facing a mental health crisis with no signs of reversal but to be clear – the COVID-19 pandemic did not cause it. This crisis long predated COVID-19 – the pandemic merely broke its surface and revealed the cracks underneath – and now, there’s no going back. The pandemic caused mental health issues to surface, the uncertain economic outlook exacerbated them and now, everyone has no choice but to respond, either by taking a step back or rolling up their sleeves. A first response came in the form of “quiet quitting.” In March 2022, Gen Z and millennial employees began to reject hustle culture and the idea of “going above and beyond” at work.**

Controversy over the matter ensued as “quiet quitting” was deemed exaggerated. Regardless, declining mental health was at its root because young employees were seeing their wages stagnate while the cost-of-living sky-rocketed, and realized sacrificing their mental health for work was no longer “worth it.” As a result, this year saw employers prioritize employee well-being as a strategic imperative. Goldman Sachs moved to [unlimited PTO](#) to signal their care for employee health, while companies attempting the four-day work week [saw 67% of employees](#) feeling less burned-out and reported resounding success in productivity.

As employee well-being becomes a top priority the deluge of mental health apps that flooded the market pre-pandemic are pivoting strategies. They are targeting employers, who pay a fee for employee access, over individual patients.

[Headspace Health](#), for instance, rolled out a new product experience that brings together meditation and on-demand therapy. The integrated app makes it easier for employees to access support and reduces [complexity and administrative burden](#) for employers. [Ami](#), a mental health startup and Meta’s first investment in Asia, aims to make mental healthcare more accessible for employees through counseling sessions on messaging platforms like WhatsApp.

As well as integrating with employers and becoming more pervasive, tech is seemingly becoming more effective in supporting mental health although, not everyone is sold. It’s no longer just apps that help track your mood or remind you to take your medication, but now there are also tools diagnosing and treating mental health conditions in new ways. [Thymia](#), a UK-based, AI-driven start-up, uses mobile video games to detect the danger signs of mental illness. Some doctors familiar with depression and technology, however, ask if the service will really provide all the information that a clinician needs.

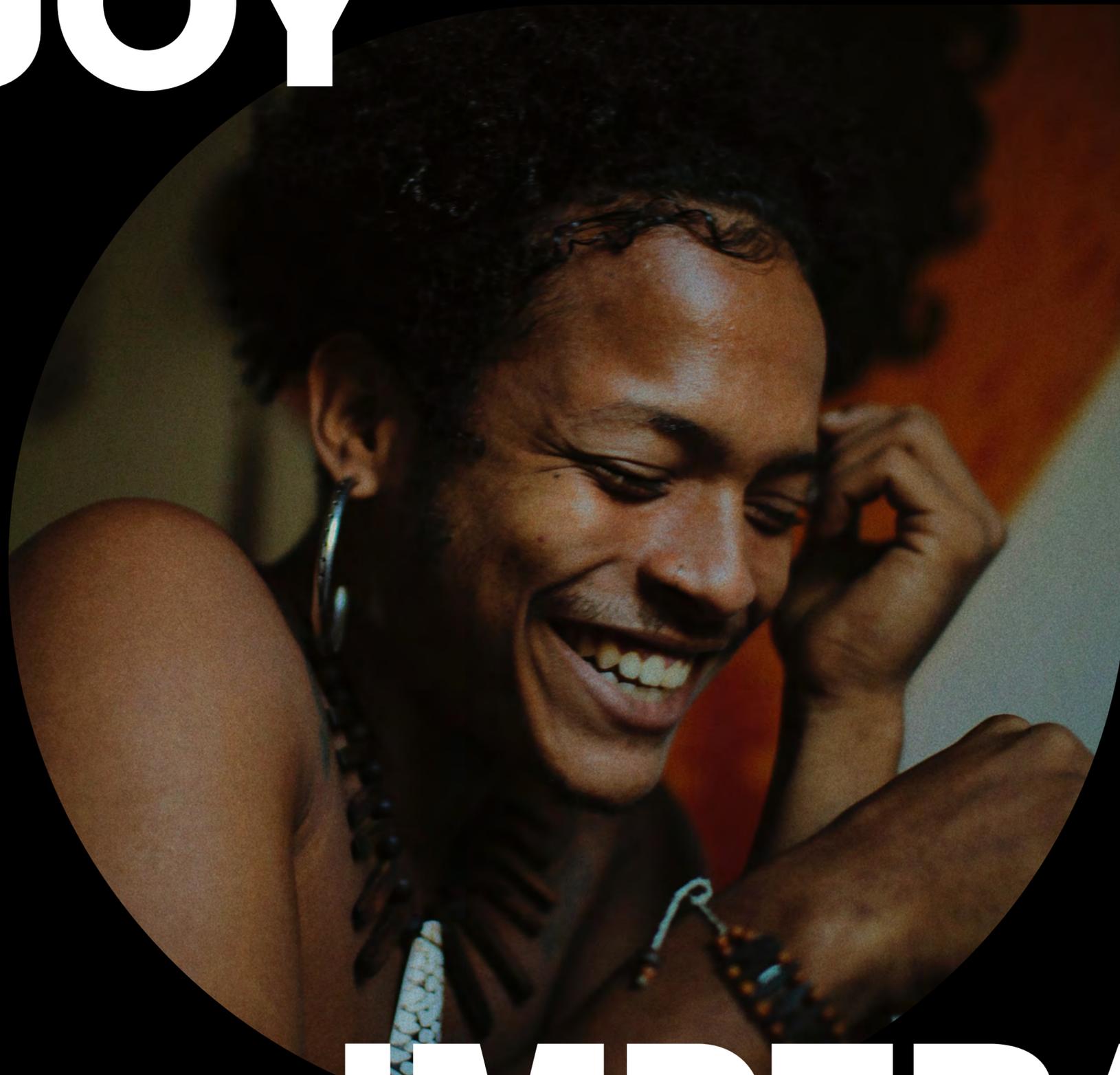
While there are doubts about technology, there is no doubt that the stigma around mental health is breaking down worldwide through greater debate and representation in media. While TV shows in the West have actively been destigmatizing mental health and disability for quite some time, in Asia, the Netflix series [“Extraordinary Attorney Woo”](#) takes a first stab at bringing more attention to autism in Korea.

Some argue that a [stereotypical depiction of disability](#) inspires further narrow-mindedness, however, autistic viewers themselves finally felt represented. In the West, the entertainment industry has a long history of misrepresenting mental illness with strugglers often portrayed as [“unpredictable” and “dangerous”](#).

Yet, with celebrities like Selena Gomez and Jonah Hill opening up about mental health in [their respective documentaries](#), vulnerability is normalized as a strength and powerful tool for self-acceptance. Celebrities addressing heavier issues creates a seismic shift in the larger mental health conversation at a time when it is needed the most.

What does this all mean for brands in 2023? More and more consumers will be looking to brands they can trust for support. From brands, consumers will appreciate care whose primary objective is not sales or self-interest. They will turn away from apathy or tokenistic support and towards a sense of authentic validation. However, the type of validation consumers seek is subtle, creating an intimate understanding between consumer and brand, it is not for display – it is quietly powerful. Brands that act from a place of authenticity to bring consumers small moments of joy, self-care, validation, or support will gain their trust. Finally, brands that lean into showing audiences they are not alone and reminding them it’s normal to struggle will play in rich emotional territory.

**THE JOY**



**IMPERATIVE**

## THE JOY IMPERATIVE

**“People are leaping for the moment, taking back their life. They’re not thinking about the future right now instead letting the future think for itself.”**

— Cristina Urban, Strategy Lead, Italy.

Set against a darker macro-economic crisis we see the desire for small moments of joy and play. “Pickleball”, a playful and silly racket game is one of the fastest growing sports in the world while small luxuries such as flowers have become everyday acts of self care, no longer something to be saved for special occasions. Silliness and surrealism act as coping strategies when the world feels unstable, while the [#cluttercore trend](#) — a maximalist outpouring of colour, clutter and idiosyncratic personal decor — acts as a joyful check to years of impeccably restrained interiors.

Meanwhile, consumers are finding moments of self-care in a host of simple ways; recent data from Global Web Index shows that 52% improved their mental health by spending time with friends and family, 50% watched TV and 38% spent more time cooking and baking.<sup>13</sup>



# THE JOY IMPERATIVE: BY THE NUMBERS

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# 90%

“The Happiness Report” found that 90% of people are more likely to remember ads that are funny and 72% of people would choose a humorous brand over the competition. Despite this, only 20% of brands report using humor in offline ads and 18% report using the tactic in [online ads](#).<sup>14</sup>

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# 88%

[88% of people](#) say that they are looking for new experiences to make them smile and laugh.<sup>15</sup>

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# 44%

[44% of US Gen Z-ers agree](#) that finding ways to celebrate themselves has become more important to them now than before the COVID-19 pandemic.<sup>16</sup>

# THE JOY IMPERATIVE: WHAT IT LOOKS LIKE



## THE PURSUIT OF FEEL-GOODNESS

Earlier this year luxury department store [Selfridges](#) created an in-store pop-up and content dedicated to challenging “the conventional (and oft-clichéd) notions of wellness with a spirit of ‘feel-goodness’, that’s inclusive, forward-thinking and, above all, joyful”. Activations included an in-store sensory reality pod; an immersive online experience and literal retail therapy sessions. Reinforcing the sentiment, fellow British department store [John Lewis](#) shifted their brand platform “Never knowingly undersold” for the first time in nearly 100 years to “For All Life’s Moments” responding to the desire for everyday celebration and plan to reconfigure stores to reflect ‘moments’ rather than traditional ‘departments’.

## PARTNERING WITH PLAY

[Pickleball](#) is currently the fastest growing sport in the United States, growing 11.5% on average over the past five years, with a 21.3% growth rate between 2019 and 2020 alone.<sup>17</sup> It’s relatively simple rules and accessible format are credited for its success and brands are tuning into consumers’ desire for play. Kraft Heinz’s pickle brand [Calussen](#) sponsored a two-hour sports comedy segment called “Pickled” featuring celebrity players whilst [Anheuser-Busch InBev](#) have just purchased a Major League Pickleball team.

## REASONS TO BE CHEERFUL

Building on the ‘dopamine design’ trend, media platforms are responding to the desire for mood-uplifting content. National Public Radio (NPR) in the US created the [Joy Generator](#) microsite offering soothing sounds and visuals to help people reframe their thinking and seek out more moments of pleasure. Similarly, “[The Joy Report](#)” is a podcast dedicated to sharing stories of climate solutions and environmental justice. Success stories are grounded in intersectionality, joy and optimism. “The earth and its ecosystems thrive on diversity and so does climate action.”

# THE JOY IMPERATIVE: A PERSPECTIVE

WIL KOSLOWSKI, STRATEGIST, AUSTRALIA



**“At lunchtime I bought a huge orange—the size of it made us all laugh. I peeled it and shared it with Robert and Dave— They got quarters and I had a half. And that orange, it made me so happy, as ordinary things often do.”  
— Wendy Cope, *The Orange***

Throughout our lives, we tend to celebrate the big moments. Walking on stage for graduation, winning the match, holding your baby for the very first time. We chase big. And yet, in a notable shift, consumers are increasingly finding joy in the simple pleasures of life. As COVID stripped modern living of its graduations, weddings, reunions and other highlights, it in turn encouraged a newfound appreciation for everyday happenings. Languishing in lockdowns afforded space of mind for people to uncover happiness in previously overlooked things – houseplants, neighbourhood walks, even dusty cookbooks. Now, as the spectre of soaring inflation and imminent recession affects spending for major events and holidays, this behaviour and attitudinal shift is set to accelerate into 2023.

Consumers are demonstrating a strong desire to make the most of every moment, no matter how mundane. A 2022 global survey found roughly half of respondents agreed or strongly agreed that they “love any excuse to have a celebration”.<sup>18</sup> The rapid rise of the social media app [BeReal](#), which encourages its users to post whatever they are doing each day at a random time, no matter how ordinary their location or activity, demonstrates the appeal of sharing unremarkable moments with friends. Meanwhile, florists are noting the surge in gifting flowers outside of traditional gifting periods.

“We don’t just see orders for special occasions like Christmas, Valentine’s Day and Mother’s Day – the big traditional peaks in our industry. We see a lot of people sending flowers to say ‘thank you’ or ‘just because.’” — [Founder, Bloom & Wild Flowers](#).

These data points highlight an increasing societal acceptance of marking the mundane, uniquely human elements of life. Living in the moment isn’t new – as far back as the nineteenth century, Emily Dickinson wrote “Forever – is composed of Nows”.<sup>19</sup> But the concept’s deep roots in culture indicate this recent shift is likely to have a more meaningful, wide-reaching impact on consumer behaviour than more ephemeral trends. It also finds common ground with the popular mindfulness movement that champions present-centred appreciation of the ordinary. The Joy Imperative has a few implications for brands looking to meet consumers on their level. There is potential to acknowledge and play into the small, nuanced and empathetic moments of the category or product experience.

Alternatively, brands can play a more involved role in helping consumers actively pursue these moments. In 2022, the popular meditation app, [Calm](#), launched a new feature, ‘Move,’ encouraging users to be active for small bursts of time to experience micro-doses of happiness. [The Joy Generator](#) site, brings together interactive stories, videos, and audio centred around bringing more joy to life. Its home screen reads, “Feeling blah? Science shows you can boost happiness by taking time for small moments of delight.” At a time when we may all feel more “blah”, those moments are to be recognised and cherished even more. In challenging times, consumers will reward those brands who can identify those moments, empathise with them, and most importantly enable them.



## 7-ELEVEN

The 94-year-old chain doubled ad spend while launching its first integrated brand campaign since 2015, breaking a six-year hiatus from TV. “[Take It To Eleven](#),” is Big Gulp energy personified. In a time where Americans were reported to be the least happy they’ve been in years, 7-Eleven radiated the joy that comes in a quick trip to 7-Eleven. Delighting in the simple pleasures and easy scores one can find within (the fruity Slurpees, customized coffees and more), spotlighting the dynamic backgrounds and cultures representative of their clientele.

When Philly-based punk band “Froggy” wrote and recorded an ode to “7-Eleven Nachos,” jokingly asking the brand to sponsor them, the brand jumped at the opportunity to produce a cheesy-in-a-good-way music video. It’s just one example of how the brand is celebrating the wild ways its customers make 7-Eleven a part of their daily lives. In fact, recently tapping into car enthusiasts who frequent 7-Eleven ignited droves of user-generated content—the brand’s TikTok account grew by 22% in followers in just 48 hours that led to the brand hosting live car meetups across the country. Dare we say, parking lots were packed. Beyond the results mentioned above, we’re proud to report 7-Eleven’s seeing share gains in every market it operates within. 7-Eleven’s delivery business has quintupled in our care through incremental store trips and sales. The ongoing campaign platform received Gold honors from the Effies and WARC in creative effectiveness.

# WHAT IT MEANS FOR BRANDS

## 1. SEIZE THE MOMENT ECONOMY

Brands who can understand, be present in, and enhance the little moments of joy and connection that keep us going in tough times will thrive; the opportunity is to connect data, empathy and technology to connect the right message with the right individual in the right moment.

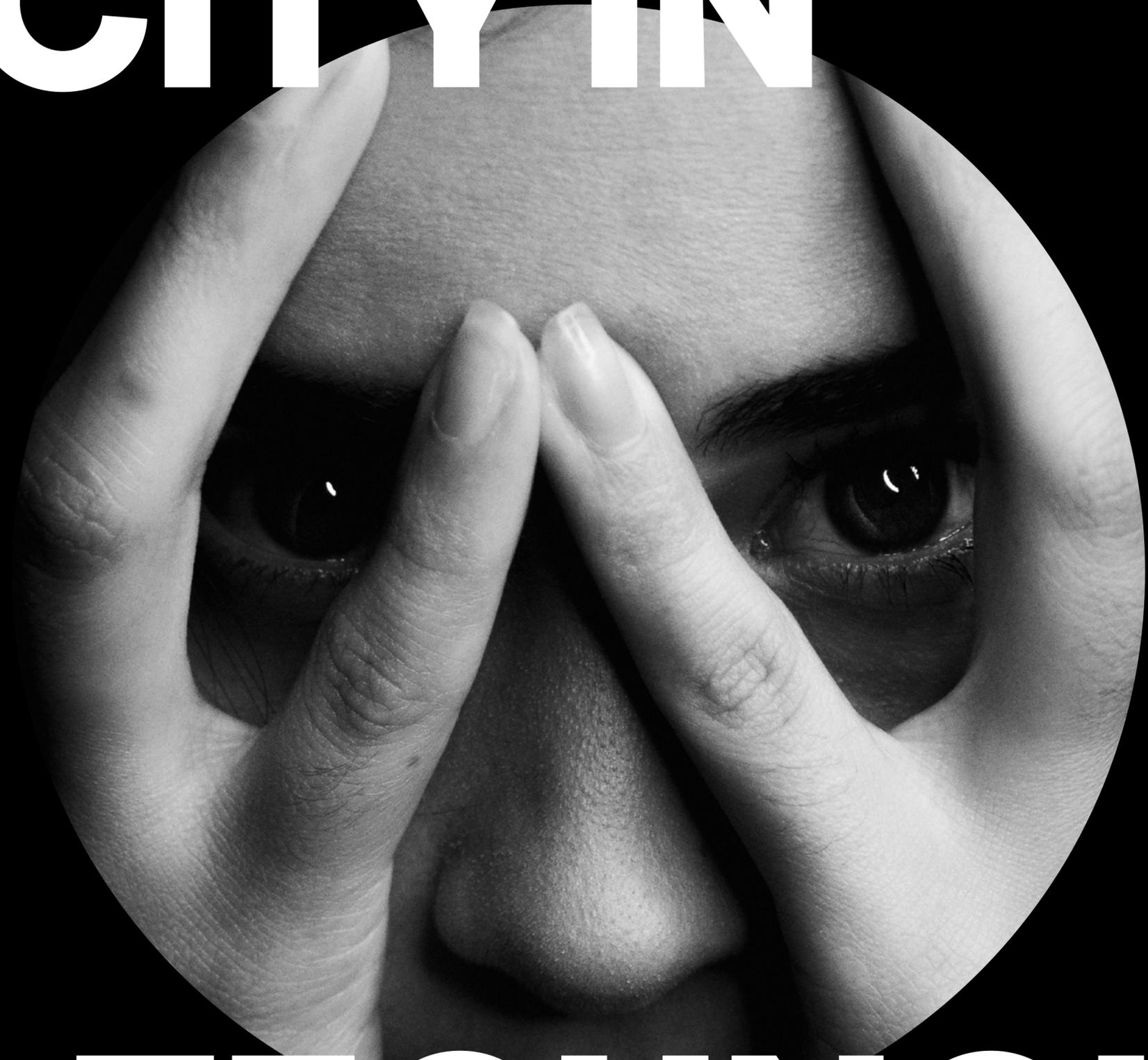
## 2. FUNNY BUSINESS

With good news stories in short supply, humour, silliness and surrealism will help brands lift spirits and provide much needed levity. As we explore later, silliness and surrealism are also emerging as tools to foil the algorithm.

## 3. BRANDS IN ACTION

As a cost of living crisis meets a cost of goods crisis head on brands will struggle to both demonstrate empathy and maintain margin. Decades of data show that emotional brand connections increase price elasticity, but consumers' spending power has seldom been so constrained. Many will be looking to brands to take practical action to support their customers and communities.

**TOXICITY IN**



**TECHNOLOGY**



## TOXICITY IN TECHNOLOGY

**As passionate as we are about tech and innovation, there's no doubt that 2022 was a year when many consumers questioned their relationship with technology after years of absolute dependence and seemingly unstoppable growth during the pandemic.**

Concerns over privacy, cyber bullying and misinformation eroded consumer confidence while a challenging economic outlook slowed down the adoption of cryptocurrency. Time spent online peaked in key markets as screen fatigue well and truly set in, while growth in eCommerce sales slipped backwards post pandemic.

After a bullish 2021, where digital art changed hands for extraordinary valuations, sales of NFTs dropped in 2022, although as this article in The Art Newspaper notes, the real picture may be a little more nuanced.

While some have heralded an early end to the NFT boom, brands such as Nike and Gucci are driving significant revenues from NFTs, with Nike generating a reported \$185M in NFT sales.<sup>20</sup>

# TOXICITY IN TECHNOLOGY: BY THE NUMBERS

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# -34

Time spent online in the UK has peaked according to GWI 2023 Trends. "Time spent online has hit a ceiling, a potential side effect of growing distrust in all things digital." Even in an internet growth market like Latin America, average daily time online has fallen by 34 mins since 2013.<sup>21</sup>

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# 1/3

According to GWI's "Connecting the Dots 2023" report disinterest in the metaverse stems from a lack of confidence online – a third of Americans surveyed who report being "interested" in the metaverse are worried about how companies are using their data online.<sup>22</sup>

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# +11%

Globally, the number of consumers who say social media causes them anxiety has grown 11% since Q2 2020 – with Gen Z and millennials the most likely to state this.<sup>23</sup>

# TOXICITY IN TECHNOLOGY: WHAT IT LOOKS LIKE



## RECKONING WITH TRUST

Conspiracy theories, fake news, and increasing sophisticated deep fake technologies are eroding consumer confidence in the internet as a place for trusted advice and nuanced debate. Dystopian fiction explores the long term potential for internet culture to impact society. “[Quiet Part Loud](#),” the first fictional audio series from Academy Award Winning director Jordan Peele uses immersive audio and sound design to present a serialised horror/thriller exploring “the roots of our conspiracy-obsessed culture where disinformation now runs rampant,” while “[Severance](#)”, produced by Ben Stiller explores a dark vision of bio-technology where employees must have chips implanted in their brains.

## TIME FOR VIRTUAL TO GET REAL

While many have been quick to pronounce the death of virtual assets, seasoned tech watchers are familiar with the ups and downs of Gartner’s infamous hype cycle. While some of the initial euphoria may have calmed, blue chip brands are experimenting with NFTs and Web 3.0 technologies at scale, across interesting use cases from collectibles to marketplaces to loyalty.

## COMBATTING TOXICITY

The metaverse was hailed as a decentralised place for new types of idea to emerge but is in danger of reproducing the same power structures that exist offline. Despite much work to address toxicity within gaming platforms, we continue to see the proliferation of toxic behaviours beyond the customary ‘trash talk’ within games. In a 2021 Anti-Defamation League study, 83% of players aged 18-45 reported experiencing harassment in online multiplayer games, some 80 million gamers ([ADL](#)). Two of the biggest games developers, [Riot Games](#) and [Ubisoft](#) are partnering to tackle abuse in the ‘verse.

**META DIVERSITY**



**META DIVERSITY**

## META DIVERSITY

**“When I was 21, the cool thing to be was famous on Instagram. Now the cooler thing to be is a mystery. Anonymity is in.” — Kaitlyn Tiffany for [The Atlantic](#).**

Independent voices have been campaigning for much greater inclusion and accountability in the online space. That starts with campaigning for better representation within the metaverse. Frustrated by the lack of options and poor rendering of Black hairstyles within video games, the Open Source [Afro Hair Library](#) is the world’s first free database of 3D modelled Black hairstyles, created exclusively by Black artists.

Meanwhile, new social media platforms are adopting more nuanced approaches to authentic identity versus personal privacy; imagining a world where a more civil and accountable online discourse is possible. Initiatives such as [Mastodon](#), [Spoutible](#) and [Post](#) envisage a new breed of social network where control lies with the individual, not the corporation, where real people connect around the issues that matter most to them. [Bot Sentinel](#) is a platform designed to identify information or harassment.



# META DIVERSITY: BY THE NUMBERS

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# 90%

Women are spending more time in the early iterations of the metaverse and are more likely to spearhead initiatives in the new and developing next generation of the internet, but men still hold 90% of executive positions at organisations shaping this emerging economy. [McKinsey, 2022](#).<sup>24</sup>

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# 70%

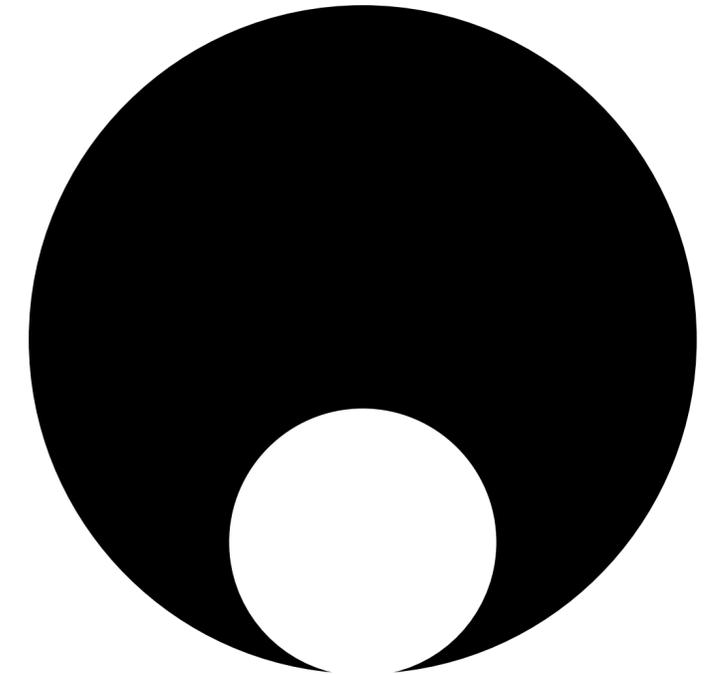
70% of survey respondents in a 2021 report from the Institute of Digital Fashion said that gender representation within virtual experiences has become vital to them. [IoDF, 2021](#).<sup>25</sup>

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# 51%

51% of 12-15 year olds say that 'protecting people from bullying' is important to them in game play. [GWI, 2022](#).<sup>26</sup>

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# META DIVERSITY: WHAT IT LOOKS LIKE



## SAFE SPACES FOR EVERYONE

Combining the trend towards niche social networking platforms with the desire to foster a more diverse, equitable and inclusive metaverse new 'safer' spaces are emerging across the 'verse. [Paidia](#) is dedicated to an inclusive and respectful gaming experience for "women, LGBTQ+ people and their allies" centering kindness, inclusivity and the safety and respect of its users. Users are building metaverse spaces in their own image like [MetaKawn](#), dedicated to representing and connecting young Muslims. [Burberry](#) has partnered with esports company Gen. G for a four part content series highlighting inclusivity in the industry and will also offer a scholarship to an emerging player.

## PARTNERING WITH PLAY

Businesses are deploying tactics to open up and out against the echo chamber and its biases. Glenlivet whisky launched a campaign to challenge the perception of the stereotypical whisky drinker by flooding Google Image searches with vibrant coloured photographs captured by Danny Kasiyre and Devyn Galindo in order to [#BreakTheStereotype](#) with images of young people and women enjoying the drink.

They also partnered with [Equal Measures](#) to support 30 participants from marginalised communities to pursue a career in the drinks industry.

## NEW PLATFORMS

People are opting for alternative platforms that allow them to conduct private, authentic and safe interactions. According to app analytics firm [Sensor Tower](#), the Mastodon app grew 657% to 1M downloads.<sup>27</sup> It is a free, open-source and decentralised social platform made up of multiple servers. Pre-registrations have launched for [Spoutible](#), a platform that allows users to 'spout off' while fighting harassment, disinformation and prejudice. [Post](#) moved to launch quickly describing its positioning as the "virtual watercooler for journalists."



## OUR WORK: CAMOUFLAGE AGAINST THE MACHINES

While we have recently become more careful about how we manage our personal data online, AI-based security cameras and in-store customer analytics are labeling individuals based on their appearances and using their information without their permissions in the cities. In Europe and the U.S., AI related laws have been revised and large companies have withdrawn from facial recognition for police.

In order to raise awareness of the issue and establish a good and appropriate relationship between AI technology and society, [Dentsu Lab Tokyo](#) and [Qosmo](#) launched textile label [UNLABELED](#) and developed camouflage patterns that evade AI labeling.

In collaboration with apparel brand NEXUSVII., the team created products such as hoodies, crew sweatshirts, and skateboards. A pop-up store was set up at Shibuya PARCO in Tokyo for demonstrations and sales. The work has achieved over 120 pieces of media coverage.



*Qosmo*

# WHAT IT MEANS FOR BRANDS

## 1. SUBSTANCE, NOT SHINY OBJECTS

As ever, new technologies prompt a wave of excitement and experimentation, which is always to be celebrated. As virtual assets, art and currency mature however consumers and CMOs alike will expect to see a meaningful value exchange, and a commercial impact. The answer will be perhaps to think less about a Metaverse strategy and more about a brand and business strategy enabled by the rich potential of Web 3.0 technologies.

## 2. DESIGNING FOR DIVERSITY

Technology teams must consciously correct some of the industry's in built biases if they are both to solve for genuine representation and to create safe spaces for the most vulnerable. [The Spoutible platform](#) for example states that "For Spoutible to be successful and tackle the issue plaguing every platform, it must start with diversity".

## 3. BEYOND INTERRUPTION

More than ever it will be vital for brands to engage in authentic conversations within social platforms. As new, decentralised platforms spring up with a commitment to authenticity and a resistance to advertiser funded models interrupting the conversation will no longer be an option in many spaces.

**THE GREAT**



**OPT OUT**

## THE GREAT OPT OUT

**“We are seeing people pushing against the status quo, moving away from hustle culture in work environments and the pursuit of over-expectations.”**  
— Aspen Grams, Senior Strategist, US.

Building on 2021’s Great Resignation, 2022 gave rise to the “Quiet quitting” phenomenon; a response to hustle culture where employees simply decided enough was enough. More broadly, we saw a step back from performative play or performative aspiration with “low stakes hobbies” replacing the performative self improvement of lockdown. On a bleaker note we saw women step back from the workplace in record numbers exacerbated by the pandemic and by spiralling costs of childcare.

As the milestones that characterised previous generations; buying a home, having a child, even buying a car moved further out of reach for younger generations, a desire to step back from a culture of goal-setting and goal-smashing has kicked in. Consumers are taking control of a volatile environment by opting out of previous generations’ definitions of success as a series of accomplishments and acquisitions.



# THE GREAT OPT OUT: BY THE NUMBERS

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# 40%

Traditional goalposts like buying a home or getting married are increasingly deprioritised — 59% of American 18 to 34-year-olds have delayed a major life event because of Covid-19, compared to 40% of 35 to 54-year-olds and 23% of over 55s ([Bankrate](#), 2021).<sup>28</sup>

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# 64%

64% of US Gen Z teens agree that they feel they have lost two years of their lives because of the COVID-19 pandemic ([Mintel](#)).<sup>29</sup>

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# 70%

70% of workers [say they would quit](#) if another employer offered better policies to reduce burnout, it quite literally pays to put employee wellbeing front and center ([Visier](#), 2022).<sup>30</sup>

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# THE GREAT OPT OUT: WHAT IT LOOKS LIKE



## LOW STAKE HOBBIES

After a decade or more of performative hobbies and side hustles (culminating in lockdown sourdough contests) consumers are returning to “just because” hobbies. Watching TV has become a form of self-care, gardening continues to flourish and reading is a priority — fiction sales have risen by 21% compared to 2019, reaching their highest point in a decade. (Nielsen via [The Bookseller 2021](#)).<sup>31</sup>

Also known as ‘[atelic activity](#)’ this is about goal-free activities, doing things purely for enjoyments sake.

## BACKSEAT GAMING

‘[Backseat gaming](#)’ is also rising as a trend. It is, just as it sounds, viewers finding a sense of relaxation and enjoyment in watching other people play games- sinking into the calming music and immersive visuals.

This trend is twinned with the rise of “[comfort content](#)” which helps you feel, cosy, comforted and supported particularly in stressful times. We also see a niche trend towards extremely long form, almost hypnotic content, such as hours long train journeys, or manufacturing processes.

## SIMPLY BEING

People are returning to the formative days of social media, sharing unfiltered content that reflects the realness of everyday. This is evidenced in the popularity of the [BeReal](#) app which notifies you at random at any one point of the day and invites you to snap a photo of whatever you are doing. Whilst the number of daily users may lag behind initial downloads (53M) it points to a desire to try and incorporate ‘realness’ back into highly polished and curated feeds ([Sensor Tower, 2022](#)). Instagram has also launched an optional [Take a Break](#) feature to remind users to step away from their screens.

## ACCESS ALL AREAS

As consumers opt out of conventional milestones, some big ticket purchases are suffering. In the UK, sales of new cars plummeted to their lowest levels for 24 years in March 2022<sup>32</sup>, exacerbated by immense supply chain disruption.

With access to ride hailing, ride sharing and micromobility solutions, younger generations are less likely to want to own a car, or even to hold a driver’s licence any longer.

**THE GREAT**



**OUTDOORS**



## THE GREAT OUTDOORS

**In parallel to this desire to disconnect and step back we see a rising desire to get outside and reconnect with nature, our bodies and the world around us.**

Post-pandemic, Chinese consumers embraced camping (or glamping) and outdoor pursuits in their millions, with camping related searches on the Alibaba platform jumping by 300% in 2020. The camping and outdoor activities trend plays to the twin desires for safe, low contact activities and for a more sustainable way to travel.

Around the world, walking has experienced a surge in popularity. TikTok trends such as #hotgirlwalk inspired users to celebrate how good their walk makes them feel, while 40% of users reported spending more time outdoors to support their mental wellbeing, according to Mindbody's Annual Wellness Index.

Similarly, parents around the world embraced a powerful desire to give their children the freedom of the great outdoors after a period of lock down.

# THE GREAT OUTDOORS: BY THE NUMBERS

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# \$29.9B

Was the size of the Chinese market for campsites in 2021, up almost 400% from 7.7 billion in 2020 (iiMedia Research Institute, 2022).<sup>33</sup>

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# +9%

According to Global Web Index, whilst travel has not yet returned to pre-pandemic levels, travel tickets are still within the top 10 major purchases for consumers (as of Aug 2022) and there has been a 9% increase in sales since Q3 2021.<sup>34</sup>

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# 253%

On Chinese lifestyle platform Xiaohongshu, the frequency of user searches that are related to cycling increased by 253% year-on-year in the first eight months of 2022.<sup>35</sup>

# THE GREAT OUTDOORS: WHAT IT LOOKS LIKE



## THE GREAT GETAWAY

Despite the allure of virtual worlds and the reality of financial restrictions, in 2023 travel and outdoor activities will soar, “people are craving immersive experiences, they need to feel things too” remarks Sergio Barrientos, SVP, Cultural Fluency, US. Outdoor recreation continues to rise building on trends for hiking, camping and walking that emerged during the pandemic. Responding to the opportunity for new outdoor experiences, in celebration of their portable smart speaker Sonos Roam, the audio giant partnered with The North Face for [Never Stop Exploring](#), a dedicated station on Sonos Radio that features nine different soundscapes especially for outdoor listening.

## EXPLORING DIVERSITY

Historically, outdoor pursuits such as hiking, rambling and camping have been sorely lacking in diversity and inclusion, with multiple studies showing severe inequalities of access to outdoor spaces and sports.

Groups such as [Inclusive Outdoors](#), [Wanderlust Women](#) (a hiking and adventure group for Muslim women) and the [Ebony Horse Club](#) are championing inclusive access to outdoor spaces and outdoor sports for all.

## PASSES TO THE OUTSIDE WORLD

Perhaps in a bid to diffuse attention away from screens, Germans turning 18 from 2023 are to be offered a €200 culture pass ‘birthday present’ voucher to get them outside experiencing art and culture. Finance minister, [Christian Lindner](#), describes the pass as “cultural start-up capital” valid for 2 years for concert tickets, theatre, music and books managed via an app. Tuning into the sentiment around screen-free and shopping-free time, US outdoor retailer [REI](#) has routinely closed its doors every Black Friday since 2015 as part of its #OptOutside movement. This year it has made the initiative a permanent commitment hereafter.

## JARDIM SONORO

A combination of heritage and music, tourism and culture, leisure and pleasure, Jardim Sonoro is a three-day festival and a unique experience designed to awaken the senses. Immersed in nature, within the vibrant city of Lisbon, it is a must-attend event for music lovers, attracting some of the biggest electronic musicians and 25,000 visitors from around the world. After a two-year break for Covid, the festival partnered with DENTSU CREATIVE Portugal to return with a new name, concept and an idyllic new natural setting: the Keil do Amaral Garden in Monsanto.

Jardim Sonoro's 'Unimaginable' is one of the first campaigns to use Mid Journey, an advanced visual AI platform that, responding to keywords sown by the agency, generated a uniquely creative graphic output. Merging the features of leading performers, including Todd Terje, Jeff Mills and Jan Blomqvist, with birds and butterflies, leaves and trees, the surreal result is both beautiful and disturbing. Inspired by the images, the agency designed font mix typography and 12 unique and unrepeatable posters.

OUR WORK



# WHAT IT MEANS FOR BRANDS

## 1. THE OPT-OUT ECONOMY

As ownership becomes less important to a generation who mark life's moments and milestones in different ways, access as a service will become increasingly important. Rental and subscription platforms for everything from fashion to automotive will continue to expand.

## 2. WE NEED TO GET OUT MORE

As consumers rediscover the power of time spent outdoors to lift their mood and support their wellbeing, brands should consider how they can enhance and augment those experiences; from building community to curating content to expanding access.

## 3. EXPLORING NEW PATHS

Aligned both to the desire for cultural immersion and the need to reclaim old narratives we touch on within other chapters, there is also an important conversation to be had about the role and history of indigenous populations in some of the outdoor spaces we treasure. Honest conversations about the history and heritage of these sites are culturally important and timely.

**REBEL WITHOUT**



**A FILTER**

## REBEL WITHOUT A FILTER

**“Gen Z are embracing absurdity to express themselves in a more ‘real’ and candid manner to rebel against the norms, and combat visual over-produced perfection that induces anxiety. This allows them to explore new ways of thinking about society and coping in chaotic times.” — Sergio Barrientos, SVP Strategy and Cultural Fluency, US.**

Consumers are drifting away from polished and perfect images primed for the ‘gram towards more playful, authentic or provocative personas that embrace their inner geek. We see this in the embrace of fashion aesthetics such as “goblincore”, “dark academia”, “weird girl” and “ugly chic” and the rise of platforms such as Be Real.

In the world of interiors, #cluttercore has grown in response to the polished, minimal interiors of old. As [Morwenna Ferrier](#) of The Guardian puts it, “In 2023, looking dreadful will be the height of fashion... as the world tips into chaos, this year will be all about forgetting aesthetics and doing exactly what you want.”

We’re also seeing the embrace of surrealism and silliness as a means to foil the algorithm. As our [Dentsu Creative AI cracker](#) proved, it’s still difficult for an AI to be genuinely funny.



# REBEL WITHOUT A FILTER: BY THE NUMBERS

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# 1.4BN

The #goblincore fashion trend has had over 1.4BN views on TikTok to date.<sup>36</sup>

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# 79%

79% of Gen Z and Millennials say their style is a reflection of their personality.<sup>37</sup>

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# 37%

37% of US social media users who follow influencers say that they follow niche vloggers and bloggers.<sup>38</sup>

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# REBEL WITHOUT A FILTER: WHAT IT LOOKS LIKE



## SUBVERTING THE ALGORITHM

In rebellion against relentless surveillance and targeting consumers are devising novel ways to outrank the algorithms. [VICE](#)'s creative agency in partnership with Brandhouse have been experimenting with face paint as a possible tactic to evade detection from facial recognition algorithms. More commercially, French books, music and electronics retailer [Fnac](#) launched a campaign in response to the fact that 80% of what we read, watch and listen to is determined by algorithms.

They countered this through the "Unrecommended by the Algorithm", campaign which offers user recommendations based on the opposite of their taste profile.

## SURPRISE ME

As people start to opt out of the cycle of latest trends, they are opting into finding unique facets of their own identity. "Anonymously run hyper-niche meme accounts are suddenly the coolest, most exciting follows on Instagram" writes Kaitlyn Tiffany for [The Atlantic](#). Samsung's latest campaign, challenges consumers to [#findyourflipside](#) discovering new and unexpected facets of themselves. Cult gamer [@loserfruit](#) was challenged to divert away from the screen and towards the dance floor whilst fashion influencer [@simplydanbrown](#) was invited to venture into object design.

## FEELING STRANGE

"Weird/surreal/absurd/chaotic seems to be emerging as a response to nihilism" remarks Keely Adler, VP Cultural Futurism, Chicago. Niche aesthetics rising up to dominate our social feeds have characterised the past year and now things are taking an increasingly more rebellious, borderline 'ugly' turn. Exhausted by the relentless cycle of fads, Gen Z are embracing "Weird Girl" fashion; an eclectic, playful, and authentic mismatch of looks. It's partly an extreme extrapolation of 'being real', part satire of the extreme churn of trends, and part outright rebellion against the high-maintenance gloss and highly filtered ideals that have been streamed through our screens in recent years.

# REBEL WITHOUT A FILTER: A PERSPECTIVE

CELLA COJOCARU, STRATEGIST, UK



**This year marked the peak of the long-standing perfection fatigue – a by-product of highly curated, aesthetically pleasing online grids. The quest for a filterless world may have started with Dove’s Campaign for Real Beauty, but it surely will not end with TikTok’s popularisation of raw content.**

People, especially younger generations, cannot be bothered to do it for the ‘gram anymore. They don’t want to live in contrasting existences, between a bleak reality and a fantastical digital persona – they want more realistic windows into each other’s lives that celebrate commonalities.

TikTok’s ‘Come As You Are’ mantra started as a fertile ground for self-expression, discovery and celebration. The rise of weird and confusing aesthetics such as ‘goblincore’ (1.4B views) and ‘dark academia’ (3.3B views) shows clear evidence that people finally feel free to embrace their inner geeks, while the surge of ‘ugly chic’ (2.3M views) and ‘maximalism’ (667M views) fashion signals a collective shift towards abandoning what’s flattering for what’s fun.

This “unapologetically me” attitude is also channelled outside the platform: makeup usage fell by 28% with foundation taking the biggest hit, while 47% of Fortnite and Roblox players said they are using their avatars to express themselves in a new and different way.<sup>39</sup>

People don’t only yearn for real identities, but also for real action. Be Real’s successful year is due to the app’s stripped back features, which leave no room for camera filters or time to find a nice background, making it hard to BeFake. Against all odds, even Instagram shows resistance against diligent curation.

The widely used, minimal effort ‘photo dumps’ take a nostalgic nod towards the early days of social media, a place to connect with friends without superficial aesthetics or algorithms taking over our feeds.

In 2023 people will continue embracing individual styles and preferences as the battlefield against perfection gets more reinforcements. We will see more friction against conventional beauty standards, with many deliberately playing around in a bid to foil socially constructed, conventional algorithms that ultimately put you in a box. No one wants to be a mass consumer anymore, meaning that brands need to encourage more playful uses of their products and leave room for more divergent stylistic configurations.

**AI-DENTITY**



**AI-DENTITY**



## AI-DENTITY

**“The 2D-Live Avatar trend is rising in APAC. Not only in aesthetic terms and to conform to manga/animation styles but also the tech is more accessible and can be customised for specific gestures or skin colours.” — Tiffany Chen, Associate Director, Strategy, Taiwan.**

While many are pursuing a life unfiltered, on the flipside we are seeing the embrace of new avatar identities. V Tubers in China and Taiwan are embracing virtual identities, enabling them to authentically engage their audiences while maintaining their privacy. Many consumers are finding these virtual personas easier to engage with than their 3D counterparts.

In parallel, AI creator platforms such as Dall E, Stable Diffusion, Chat GPT and Jasper are creating new models for how we think about the nature of creativity and the future of work. With the ability to generate extraordinary imagery and convincing copy in real time, and AI generated articles already a reality in many newspapers how long before AI takes on much of the manual work of adaptation, resizing and repurposing agencies carry out today?

Meanwhile, the singer Holly Herndon has created a deepfake of her own voice and identity. Holly+ “a first of a kind voice instrument for you to play and experiment with” uses Herndon’s voice but can be prompted to sing anything, or to enable other artists to sing with her voice.

As well as making music, Holly+ poses important questions about the nature of AI training data, ownership and consent.

# AI-DENTITY: BY THE NUMBERS

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# 64%

According to [Intel Global Consumer](#) data, 64% of Southeast Asian consumers say they are interested in trying things in the metaverse that they would not try in real life.<sup>40</sup>

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# 30%

[Gartner states](#) that virtual influencers will receive 30% of influencer marketing expenses by 2025.<sup>41</sup>

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# 1/2

According to [Intel Consumer Data](#), nearly half of people who follow social media personalities are interested in following a virtual influencer.<sup>42</sup>

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# AI-DENTITY: WHAT IT LOOKS LIKE



## AI ARTISTRY

Creators are creating assets — accessories, avatars — and entire worlds in the digital realm and demand for their artistry is booming. “Just like you decorate your bedroom or home, for the people that are using social VR as an extension to their social life, they want an environment that feels comfortable to them” comments [VICE](#). In acknowledgement of the desire for custom assets, [L’Oreal](#) recently partnered with Ready Player Me, the leading cross-game avatar platform for the metaverse, to premier exclusive makeup and hair styles that can be used across more than 4,000 platforms.

## PROMPT MARKETPLACES

Platforms like Dall E and Stable Diffusion are creating new models for how we create art, generating imagery purely from descriptions written in natural language or “prompts”. As “prompts” or concepts become increasingly valuable we are seeing the emergence of ‘prompt engineers’ to generate the best results with marketplaces like PromptBase allowing users to sell optimum phrases. We’re also seeing exciting potential for world building, re-building or even pre-building. Twitter account [@betterstreetsaj](#), led by New York Artist Zach Katz went viral this year, utilising DALL-E-2 to envision how car-centric streets could be redesigned for pedestrians.

## V-TUBING AMBASSADORS

We’re seeing influencers embrace “Virtual Tubing” as a way of adopting alternative identities and maintaining privacy particularly in Asia Pacific. Dentsu Creative’s own virtual influencer, Rumi, is a prime example, created through the dentsu VI platform. The adoption of virtual influencers by brands is maturing, for example [Tmall’s Luxury Pavilion](#) launched its own virtual influencer, Timo, to promote its labels. Baidu launched the first AI emotional healers, [Lin Kaikai](#) and [Ye Youyou](#), to provide 24-hour online companionship and functional services and to assist the app’s 600 million users with mental health issues.



## VIRTUAL IDENTITY FOR BRANDS: DENTSU VI

Imagine, what would your brand look like if it had a face? Dentsu VI is a first of its kind Virtual Identity service that provides brands with a face and personality to show up and interact in the online world, whether it be on e-commerce platforms, serving as virtual influencers at live events and across social media, or interacting with consumers in realtime in the Metaverse.

Rae, one of Dentsu VI's Ready Made influencers, is Asia's most popular hyper-realistic virtual personality and influencer. Her Instagram profile continues to make waves in Singapore and internationally.

Created by CGI technology and powered by AI solutions, Rae traverses between the real and virtual, advocating for a better world that combines both dimensions.

# WHAT IT MEANS FOR BRANDS

## 1. AI-EFFICIENCY WINS

As AI assisted creativity accelerates, we see real potential for AI to take on many of the more time consuming and less creative tasks that currently consume agency time; from resizing assets to creating multivariate copy tests to creating long form brochure-ware. While human oversight and intervention will always be needed, time and creative capital could be freed up for more conceptual tasks.

## 2. CREATIVITY WITHOUT LIMITS

With the ability of AI assisted creativity to generate an infinite number of images and variations, and to imagine impossible scenarios the only limitations will be our collective imaginations. One challenge we will all need to wrangle with as we dive deep into this exciting new toolkit are the ethics of our new tools; questions of ownership, plagiarism and bias will dominate discussion for years to come.

## 3. CUSTOM CUSTOMER SERVICE

The ability to generate engaging AI influencers and avatars opens up the possibility of a personal shopper or consultant for every customer, or even a personal avatar who can try on clothes in the virtual space, reducing returns and improving margin.

# HANDBRAKES



# ON GROWTH

## HANDBRAKES ON GROWTH

**"It is clear the post-pandemic spending bubble has burst, with retailers facing tougher trading conditions, falling consumer confidence, and soaring inflation impacting consumers' spending power." — [Helen Dickinson, BRC](#).**

A perfect storm is creating a challenging environment for growth in 2023. While consumers are facing a cost of living crisis unprecedented in recent decades, businesses are facing a cost of goods crisis brought on by inflation, climate instability, supply chain challenges and war in Ukraine.

A vicious circle of rising prices and falling disposable incomes creates a bleak economic outlook for 2023 for many. The UK Economy is predicted to decline by 1.4% in 2023, with consumer confidence hitting an all time low. Similarly, US consumers are twice as pessimistic about the economy today as they were at the height of the pandemic.

Globally, the IMF are predicting that growth will slow to 2.7%, warning that "The worst is yet to come, and for many people 2023 will feel like a recession." Predictions from Morgan Stanley suggest that the US will narrowly avoid recession with 0.5% growth, while emerging economies may show a more positive trajectory.

Brands and businesses across every sector will be impacted by dramatic shifts in consumer behaviour, as even more affluent middle class consumers start to re-evaluate what were once default purchases.



# HANDBRAKES ON GROWTH: BY THE NUMBERS

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# 4/10

Nearly four in ten [have reduced spending](#) on nonfood discretionary items.<sup>43</sup>

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# 58%

Of European consumers [state that rising prices](#) are their biggest concern.<sup>44</sup>

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# 276M

In April 2022, global food prices were the highest they'd ever been, with more than [276 million people](#) across 53 countries and territories at risk of severe food insecurity – double pre-pandemic levels.<sup>45</sup>

# HANDBRAKES ON GROWTH: WHAT IT LOOKS LIKE



## PROFIT VERSUS PEOPLE

Food prices in the US have risen 13.5% year on year, according to the Bureau of Labor Statistics.<sup>43</sup> While some brands feel they have little choice but to pass rising costs on to the customer, others are shouldering the cost of essential items on their behalf.

For example, French retailer [Carrefour](#) froze the prices of 100 of its own-brand products in its French stores for 100 days to soften the impact of inflation on consumer, with similar initiatives in place from retailers such as Aldi and Boots.

## SUPPORTING THE MOST VULNERABLE

With many families facing stark choices this winter, ethical businesses are stepping up to provide support.

[All Plants](#), a plant-based food brand, delivered 7,000 “Not at School dinners” to families facing rising food costs during the school holidays while Kraft Heinz partnered with [Morrison's](#), a leading UK supermarket, to offer a free lunch to anyone in need who came in store to “Ask for Henry”, inspired by founder Henry J. Heinz.

## THE LIPSTICK EFFECT?

It remains to be seen whether the famous “lipstick effect” will be maintained in 2023, with consumers holding on to small treats to boost their spirits. The ubiquity of “buy now pay later” schemes may be a factor, with 17M customers using buy now pay later schemes in the UK alone.<sup>46</sup> [Data from Global Web Index](#) suggests that right now, consumers are looking to fashion, takeaway food, and technology as ways to treat themselves on a budget, with beauty and skincare products remaining high on the agenda for young women.

**THE IMPERATIVE**



**FOR GOOD**

## THE IMPERATIVE FOR GOOD

**As brands and businesses face harder and harder choices, they begin to realise that growth and good can no longer be pursued in parallel and that a fundamental reset is required in order to align commercial success with new business models that rely less on relentlessly consuming scarcer and more volatile resources.**

As extreme weather wreaks havoc on cities and farmlands alike, businesses and governments will begin to realise that the cost of action will ultimately be dwarfed by the cost of inaction. In the first half of 2021 alone, for example, climate-related disasters in the US inflicted \$42BN worth of damage covered by insurance.<sup>47</sup>

Meanwhile, as cities worldwide legislate against ICE vehicles and rising emissions, we see car manufacturers accelerate the shift towards electric and towards alternative ownership models. The micromobility trend also shows no sign of slowing down, on track to reach a predicted \$6BN by 2027.<sup>48</sup>

Innovative brands are finding ways to repurpose old infrastructure to regenerate cities for the better, such as Ooneepod, repurposing vacant newsstands in New York to providing parking, charging and respite facilities for delivery workers. Meanwhile, a new village in Copenhagen goes further still, aiming to solve for all 17 of the UN's Sustainable Development Goals.



# THE IMPERATIVE FOR GOOD: BY THE NUMBERS

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# 145BN

The EU has lost around €145 billion in a decade due to climate-related events, according to Eurostat via [World Economic Forum, 2022](#).<sup>49</sup>

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# 2.8%

Just [2.8%](#) of scripted Movies and TV shows released in 2016-2021 mentioned climate change.<sup>50</sup>

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# 95%

[95%](#) of those surveyed in our dentsu CMO Survey agree that it is a brand's responsibility to change behaviour and to change society and 87% agree that brands have an urgent responsibility to drive action on climate change.<sup>51</sup>

# THE IMPERATIVE FOR GOOD: WHAT IT LOOKS LIKE



## SHARED VALUES

Tesco, the UK's largest supermarket is addressing one of the biggest barriers to sustainable action - shareholder profit. As reported in the [Grocery Gazette](#), they have set an ambitious deadline to cut food waste in half by 2025 and linked that objective directly to executive bonuses. Executive directors must support in achieving these targets in order to benefit from tens of thousands of pounds in Tesco shares.

## BEYOND CONSUMPTION

Recycling, recommerce and rental models are continuing to accelerate within the fashion industry. Luxury fashion outlet store, The Outnet, offers a resale concierge service for its customers. [Department store Selfridges](#) announced an ambition to drive 50% of sales from recommerce, rental, repair or refills by 2030. Services such as Thrift are making it easier for consumers to sell pre-loved items in exchange for credit, while community rental platforms such as Hurr and By Rotation are enabling users to earn money on their fashion investments.

## CLIMATE REPARATIONS

Governments are now acknowledging that industrialised nations have benefited from behaviour that is now creating disproportionate climate breakdown in the global south - evidenced this year for example by catastrophic floods in Pakistan. At [Cop27 in Sharm el Sheik](#), a historic agreement on "Loss and Damage" funding for the most vulnerable countries in the world was agreed, alongside an agreement to provide technical support to those countries via the Santiago Network.

# THE IMPERATIVE FOR GOOD: WHAT IT LOOKS LIKE

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## INCENTIVISING GREEN CHOICES

Brands are experimenting with ways they can generate sustainable sales without excessive consumption. Acknowledging the churn of models and the role the telecomms industry plays in extraction and ewaste, this year Finnish electronics company Nokia launched [Nokia Circular](#), a cellphone subscription service that rewards subscribers for retaining their device for longer than either recirculates or repairs the device.

Meanwhile Apple has [introduced its newest recycling innovation](#), a machine significantly improving the recovery of materials from recycled electronics.

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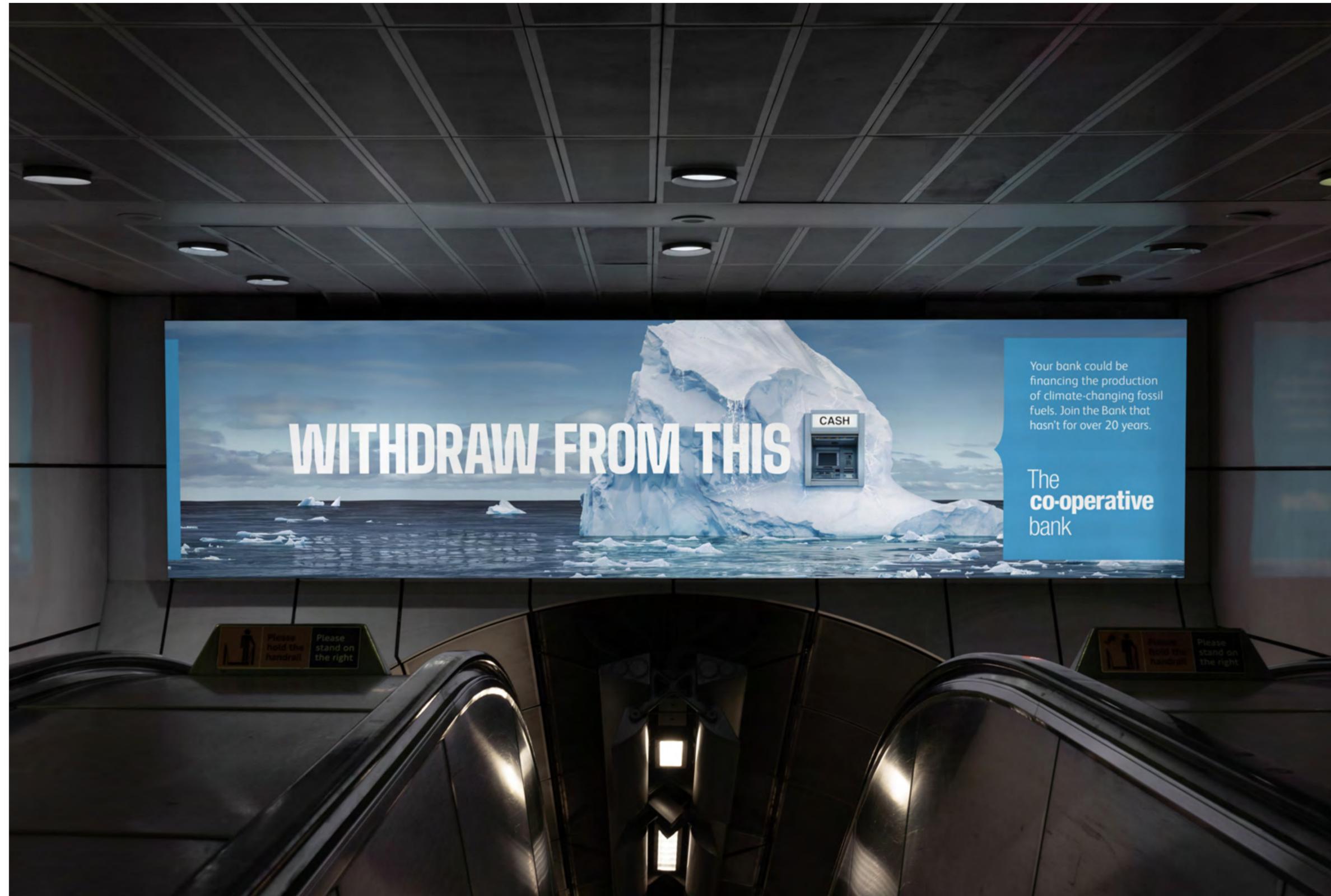
## COMMUNITY POWER

In response to rising fuel prices and instability, communities are coming together to generate their own sustainable energy sources.

From [hydroelectricity in the Scottish Highlands](#) to a network of European Energy Co-operatives, communities are coming together to safeguard their supply of clean energy, as portrayed in Patagonia's documentary "[We the Power](#)".

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## HOLDING BANKS TO ACCOUNT: CO-OP

The Co-operative Bank lifted the lid on the issue of fossil fuel finance through a campaign urging people to 'Withdraw From This' in an effort to tackle the climate crisis.

The dramatic campaign shows a customer taking money out of an ATM. As they do, the walls of the bank crumble away to reveal the journey their bank notes have been on. They flutter through scenes of worldwide devastation caused by the fossil fuel industry, before finally being dispensed into the customer's hands. "Do you know where your bank invests your money?" says the voiceover. "It could be logging in the Amazon. Or coal-fired power stations. It's time to Withdraw From This."

The spot ends by calling on people to join The Co-operative Bank – a bank that hasn't financed fossil fuel production for over 20 years. The brand also delivered compelling, out of home takeovers in major transport hubs, delivering unmissable impact and reappraisal.

## HELPING CHILDREN CREATE THEIR PLACE IN THE WORLD

The issue of equal and accurate representation for all is an old one. One that is exacerbated as the world becomes increasingly diverse without simultaneously advancing equal and accurate representation. The effect has been significant and unsettling—generations of children growing up in a world that doesn't reflect them.

Crayola needed to launch Colors of the World, 24 specially formulated crayons designed by Victor Casale, current CEO of MOB and Pure Culture Beauty to mirror and represent over 40 global skin tones. We helped them ensure the campaign achieved the reach and attention necessary to foster a greater sense of belonging and acceptance and cultivate a more inclusive world for children of all ages, races, cultures and ethnicities.

The campaign was recently awarded the Effies Iridium Award and was named the most effective campaign in the world at the second annual Global Best of the Best Effie Awards. The work also won the Global Grand Effie Award in the Product/Service Launch category.



### OUR WORK

# 2.4BN

Impressions

# 3.7M

In Revenue (\$)

# 1.5M

Units Sold

# THE IMPERATIVE FOR GOOD: A PERSPECTIVE

JUNE FONG, STRATEGY DIRECTOR, UK



Will we come out of this season changed or will we simply revert to our ways? My gut says the past three years of shake up may bring about a rewiring of our ideals. From chasing productivity as an indicator of success to wellbeing as an indicator of fulfilment. [According to the Bank of England](#), we will be entering a different shaped recession in the coming months. Unlike previous recessions which lasted for 9-12 months (a deep V-shaped curve), this upcoming recession is forecasted to last longer (up to 18 months), a shallower U-shaped curve. What does that mean?

Whilst this may look different in many markets, coming right after a pandemic means a resilience has been built up. There is a collective sense of defiant optimism to no longer allow our lives to be held back, with 56% of individuals trying to balance having fun while making up for lost time with saving money<sup>52</sup>. It is no longer a sacrifice of one or the other, but a compromise of this and that. This would bring about less drastic changes in spending habits, but a lasting mindset change in one's relationship with money.

As individuals become increasingly considered with their spend, we will find them prioritising quality over quantity. When chatting to a Gen Z consumer recently, she claimed she will reduce the number of times she shops at Waitrose but will be buying herself a Prada bag for Christmas as it will last for years. Quality ranks ahead of cost when deciding which brand to buy from<sup>53</sup>. This would mean businesses will have to actively think about what growth looks like in the coming years, it will not be volume driving and abundance, but one of holistic appreciation reflected in higher prices.

With that, we will most likely not see a comeback of the lipstick index phenomenon - [Estee Lauder](#) selling the most amount of lipstick in its history in a year of recession. Lipstick, a small joy as a means of escapism from the dreary recession in the '00s. Instead, we are likely to see people approaching recession with a lot of realism and consideration. The question that begs to be answered is what will greet us on the other side? Historical data from McKinsey has showed us that companies that respond and not react to recession will emerge as winners<sup>54</sup>, but beyond the mechanic of achieving ESOV, how should businesses be aligning themselves? In Rollo May's "Man's Search for Himself",<sup>55</sup> it depicted a scene quite similar to what we are seeing. This was post World War II, where anxiety levels were heightened and no one has experienced anything quite like it. This collective anxiety was desperate to grip onto an ideal for solace and purpose. Unsurprising, this was when the term 'consumerism' was introduced and brands started to sell the American dream, a life of materialism.

This time around, brands will be required to unsell that dream. Productivity can no longer be defined by relentless consumption but instead business success should be aligned to societal wellbeing. There are signs of us moving towards this, with the importance of ESG and active stewardship in boardrooms. It is time for brands to start referring to our audience as citizens who share in this world we live in and not consumers who simply take from the world. There's never been a more exciting time to be in marketing, to rethink our BAU habits and start being responsible with the culture we are promoting and in turn start behaving like a citizen ourselves.

# WHAT IT MEANS FOR BRANDS

## 1. REAPPRAISAL IS RAMPANT

It has never been a more dangerous time to assume “business as usual” as consumers the world over feel the cost of inflation. Decades-old brand loyalty is being called into question as nervous consumers count every penny more carefully. Brand love matters more than ever, but love will be built through action not advertising alone.

## 2. PLAN TO PIVOT

In a world where “permacrisis” is a new part of our vocabulary, hoping things will simply go back to normal feels futile. Now is the time for businesses and brands to run at the future, exploring sustainable new business and revenue models that either remove or mitigate their dependence on ever more volatile market and climate conditions.

## 3. COMMUNITY MATTERS

While it is clear that no one brand, business, government or individual can solve the challenges we face alone, our ability to connect like minded institutions and individuals in common cause is what will make a difference. Brands have a unique opportunity to engage consumers in mutually beneficial communities where their sustainable behaviours are enabled, recognised and rewarded.

# SUMMARY

We began our report with Charles Dickens, and it seems only right to end with another poignant thought from “A Tale of Two Cities”: “A wonderful fact to reflect upon, that every human creature is constituted to be that profound secret and mystery to every other”.

Perhaps the greatest trend for 2023 and beyond is the desire to uncover those secrets and decode those mysteries. What we see in themes like the end of monoculture, the desire for cultural immersion and the rejection of polished and curated identities is the desire to see and be seen for who we really are.

As old orthodoxies and institutions look more vulnerable, we see a powerful desire to tell new stories, reclaim old narratives and build new worlds. Small acts of community and co-creation have power in a world that can all too often feel out of control.

If relevance, targeting and creativity by algorithm has dominated the last decade of the industry perhaps the volatility of our current cultural landscape represents an opportunity to worry less about being relevant and more about being interesting, honest and authentic.

A tale of new cities, new cultures and communities is there to be written.

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# THANK YOU

Come invent the future with us. A global network designed for today and tomorrow.  
Welcome to DENTSU CREATIVE.

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