

HEALING OVER HOPE

5 Shifts for Impact in a World
that Puts Brands and People
in Fight or Flight Mode

Ogilvy

THIS IS NOT A TREND REPORT.

Since we rang in the 2020s, “trends” have metamorphosed faster than it takes to get on board for them. One day you hop on the trend, the next you are already behind the times.

THIS IS A LENS INTO A SOCIETAL SHIFT.

Instead, this report analyzes the fundamental ways in which human and societal reactions are shifting. These shifts are not short-lived, but rather a fundamental change in how people are responding to the world around them.

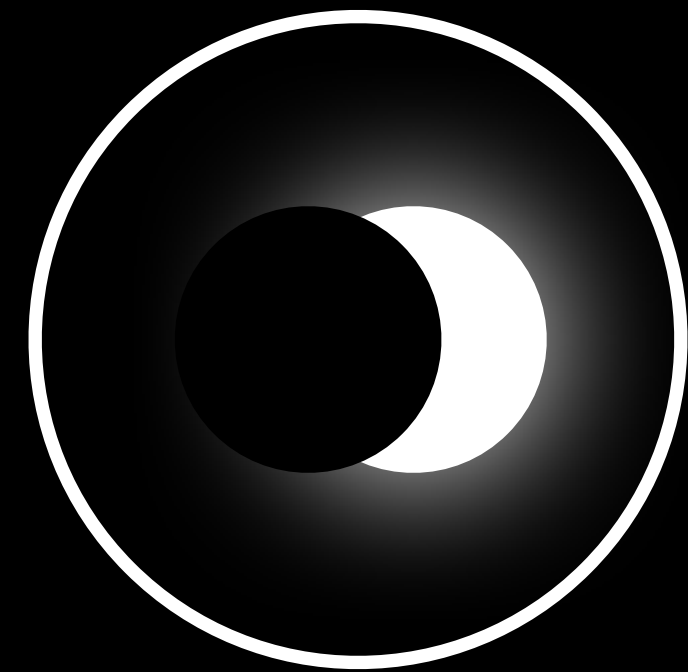
The last time we released this report, in the days following the peak of the pandemic, we explored how people wanted a beacon of hope for brighter days ahead, and how brands sharing hopeful promise was sufficient means to resonate with consumers.

Now, we are seeing a dramatic evolution. The brighter days did not arrive in the way people thought they would, with the realization that tough times are a guarantee of life. As a result, people are taking matters into our own hands, and expecting brands to help them in their pursuits.

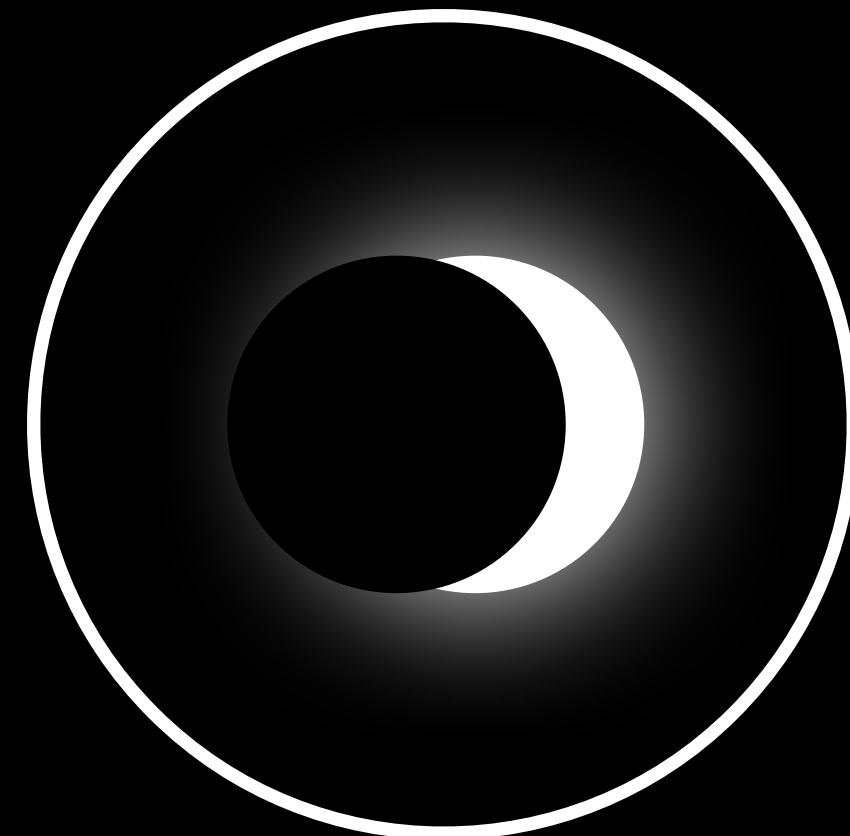
For brands, the shifts in this report can unlock new ways to connect with consumers. Recognizing the human desires behind them can help your brand act like a flashlight—a companion that a person carries with them, helping make an impact on their own lives and the world.

THE DARK REALITY

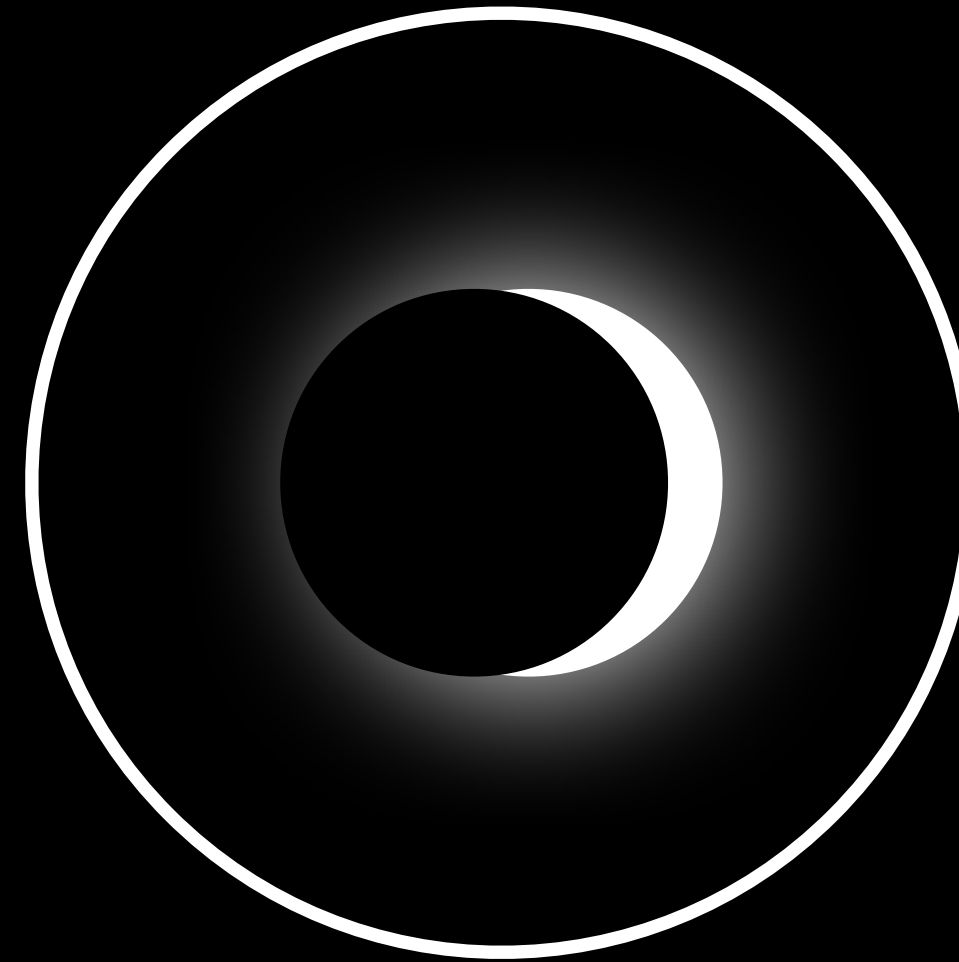
THE PAST FEW YEARS HAVE BEEN DIRE, BUT IN 2020 WE HAD A TOTAL ECLIPSE



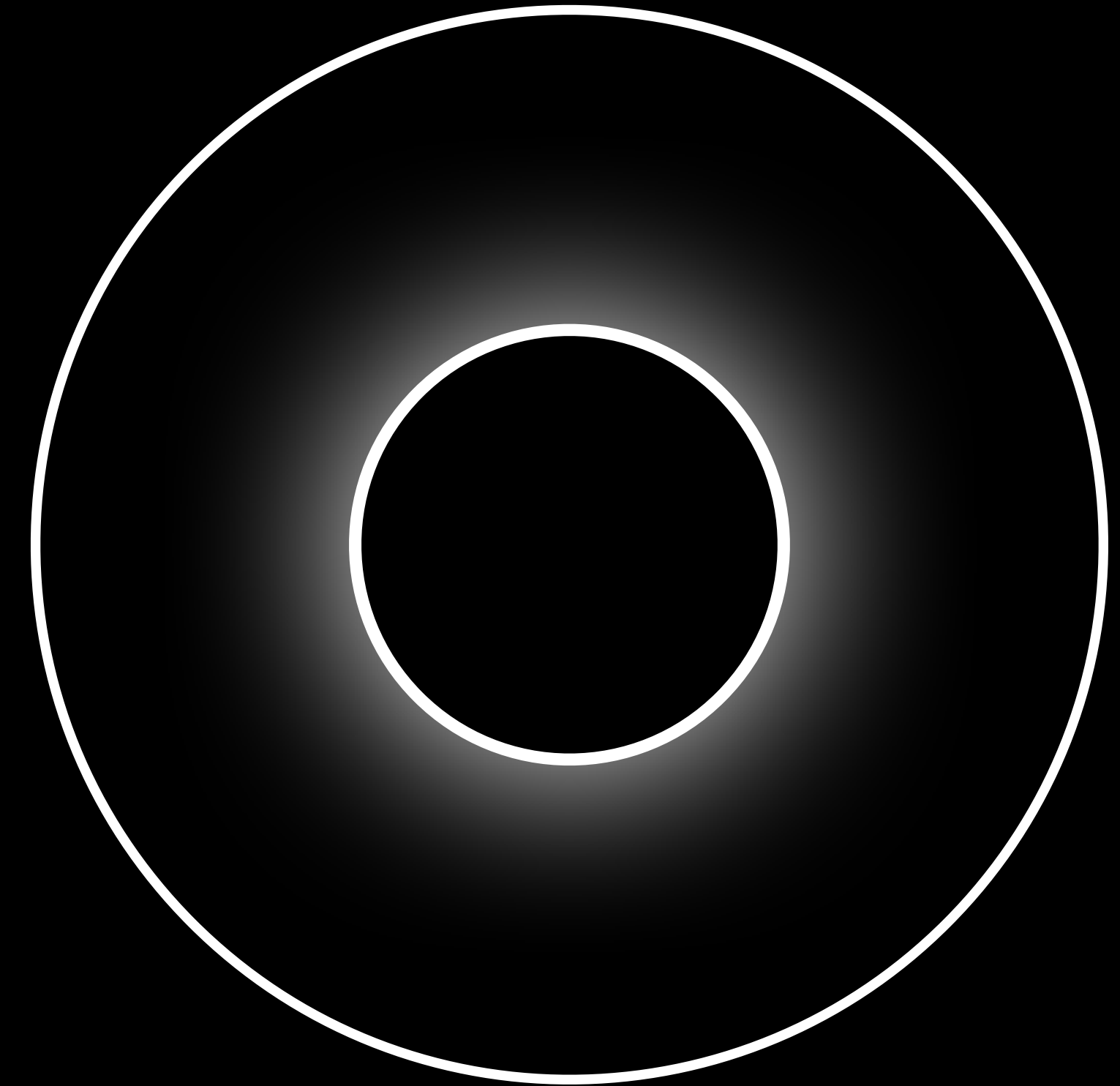
2017



2018



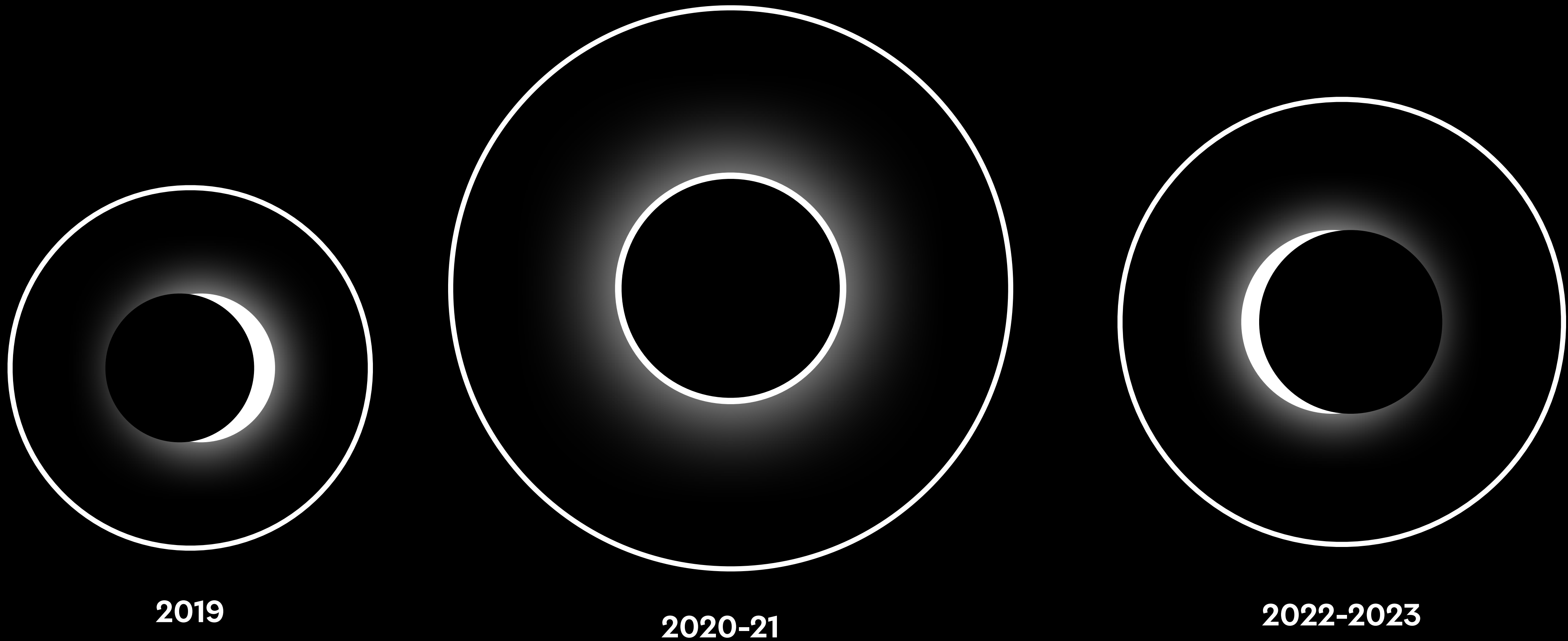
2019



2020-21

The events of 2020 truly forced us to change the way we live our lives. All of these events proved to us that the world was in trouble, and if we did not do something to change our ways, we would suffer the consequences.

WHILE WE SURVIVED, THE SUN HASN'T COME OUT YET



2019

2020-21

2022-2023

Maybe not as shockingly as in 2020, the world keeps burning as we make it through the first half of 2023. The cycle of bad news continues on—from evolving Covid strains, climate crises, inflation and recession, to political scandals, mass shootings and more. After 2020, not much else can phase us—but there's still that fear that the worst is always yet to come. The sun still hasn't come out just yet.



WE WERE PROMISED HOPE... BUT DID IT EVER ARRIVE?

Coming out of a truly “unprecedented year” (or two) forced us to re-examine what going back to “normal” would look like—and if it was even an option anymore. After the pandemic, political, business, and community leaders promised hope—a change in how we are treated, how we will treat others, how the world fundamentally would work. Yet, as the world continued to change around us, many aspects of our society took one step forward and two steps back.

TWO STEPS BACK *BY THE NUMBERS*

66%

Of global consumers feel “the world I live in feels like an increasingly hostile and uncertain place.”

(Kantar)

68%

Of global consumers are concerned about inflation and rising prices.

(Kantar)

64%

Of people across 27 nations say things in their country are heading in the wrong direction.

(What Worries the World Survey via IPSOS)

39%

Of American college students are pessimistic about the future of the world.

(2022 American College Student Survey via Challey Institute for Global Innovation and Growth)

TWO STEPS BACK: MANIFESTATIONS

OGILVY



Last June, the Supreme Court voted 6-3 to overturn Roe v. Wade, reversing the 1973 ruling that established abortion as a constitutional right in the U.S. Although 6 in 10 adults disapproved of the court's sweeping decision, almost half of U.S. states immediately set forward harsh abortion bans, leaving many women (67%) feeling like they woke up with less rights than the day prior.



Earlier in 2022, Russia invaded Ukraine, kickstarting an ugly and what many believe to be unjustified war. As of early November, its estimated that there have been 200,000 military casualties on all sides, with many areas of Ukraine completely decimated.



As the world returns back to post-pandemic “normal,” calls to action to fight climate change have largely been ignored. As a result, concerned climate activists have staged protests across the world, ranging from NASA climate scientists chaining themselves to banks to cans of soup being thrown on the Mona Lisa. People are worried, and large scale changes don't seem to be occurring at the rate they were once promised.

TWO STEPS BACK: MARKETING MANIFESTATIONS

OGILVY



After a decade of increased body size representation and mainstream acceptance of the body positivity movement, this past year has ushered in a regression in body diversity. Celebrities are using Ozempic to become ultra thin, Ro weekly weight loss shot ads are plastered all over the subway, and mid and plus size models disappeared from fashion weeks around the globe.



While marketing has been trending towards more representation, inclusivity, and progressive values, certain sectors are not happy with this change. A new service called Woke Alert promises to text people when a brand is being “woke” so consumers can boycott that brand—a threat to brands looking to take a stance on a political topic.

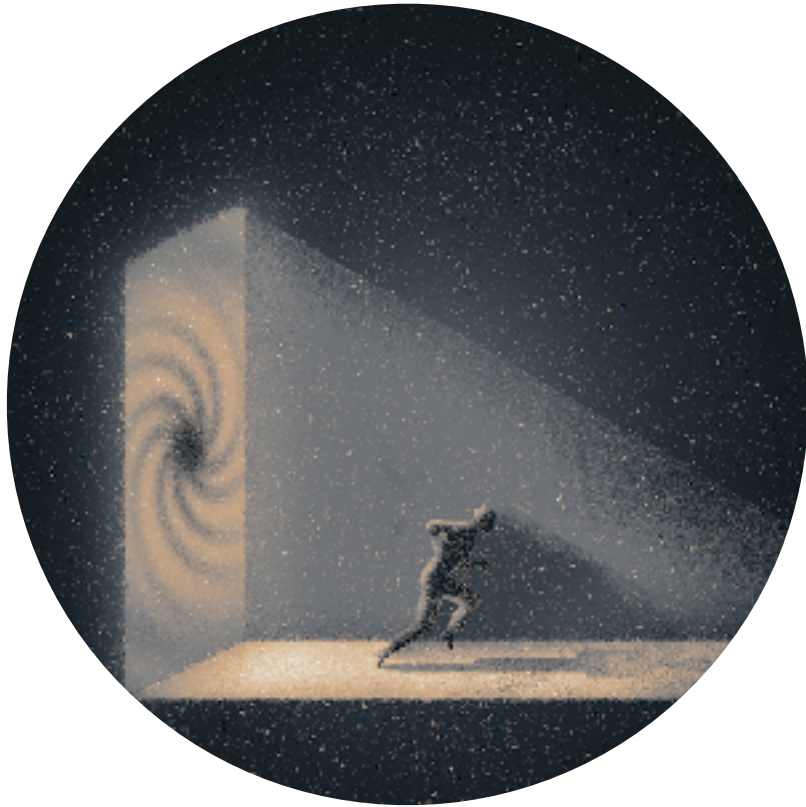


Similarly, Bud Light took a major brand blow this year after sending Tik Toker Dylan Mulvaney, a transgender woman, a pack of beers. Rather than affirm their support of the LGBTQ+ community in the wake of conservative backlash, Bud Light apologized for the collaboration, now prompting boycotts from the LGBTQ+ community and supporters as well.

HOW WE RESPOND

PEOPLE'S RESPONSE TO THE EVER-PRESENT DARK REALITY HAS EVOLVED OVER TIME

OGILVY



2017 / 2018 Escape from Harm

People were trying to make themselves feel safe and comfortable in the face of the many things triggering anxious responses. They turned to comfort and escapism to shield themselves from the harsh realities of the world.



2018/2019 Take Control

In 2019, we saw a shift towards taking control. People were no longer just looking to comfort themselves, but wanted to take the issues head-on.



2020/2021 Rebuild a Better World

When the world comes crashing down, it is up to us to rebuild a better world together. 2020 was the push over the edge that we needed in order to give ourselves permission to make drastic changes to our ways.

THIS YEAR, WE ARE CHOOSING OUR BATTLES

OGILVY



2017 / 2018 Escape from Harm

People were trying to make themselves feel safe and comfortable in the face of the many things triggering anxious responses. They turned to comfort and escapism to shield themselves from the harsh realities of the world.



2018/2019 Take Control

In 2019, we saw a shift towards taking control. People were no longer just looking to comfort themselves, but wanted to take the issues head-on.



2020/2021 Rebuild a Better World

When the world comes crashing down, it is up to us to rebuild a better world together. 2020 was the push over the edge that we needed in order to give ourselves permission to make drastic changes to our ways.



2022/2023 Fight or Flight

We experienced a societal trauma. When the body experiences trauma, we see two options: to fight, or to flee. Looking to combat the pendulum swing in the wake of this trauma, we are taking our future into our own hands and choosing either to act, or to escape.

FIGHT OR FLIGHT

The pandemic created a collective trauma for us all. When the body experiences trauma, it has two options: fight or flight.

Rather than succumb to the pendulum swing in the wake of this trauma, we are welcoming the choice between activism and escapism.

FIGHT OR FLIGHT

To fight, or to choose activism, is to pick one's battles. To fight against the forces trying to keep us down, and to take action to make our lives better, rather than live at the will of the elements.



FIGHT OR FLIGHT

To fly, or to choose escapism, is to protect yourself by fleeing when necessary. To choose yourself over outside forces, and champion your own wellbeing, in a world that is pushing against it.





FIGHT

27% 90%

Of young people (ages 18-29) turned out to vote in the 2022 midterm election and helped decide critical races, the second-highest youth turnout rate for a midterm since 2018.

(Center for Information & Research on Civic Learning and Engagement)

Of global consumers who feel they can make a difference take personal environmental action against climate change

(Kantar)



FLIGHT

850% 50%

Increase in Google searches for how to move to Canada from the US following the overturn of Roe v. Wade

(Axios)

Of the US workforce is made up of “Quiet quitters”—people who are refusing to go above and beyond at work, instead choosing to meet the basic needs of their job to preserve their mental health

(Gallup)



FIGHT MANIFESTATIONS



Following the death of Mahsa Amini, a 22-year-old who died in police custody after refusing to follow the Iranian dress code, young women and girls staged the most sustained uprising in the 43-year history of the Islamic Republic. The movement has spurred non-violent acts of protest—yet has been met with violent responses from the police. 400 Iranian protesters have been killed by security forces. Despite the violence, Iranian women are continuing their fight.

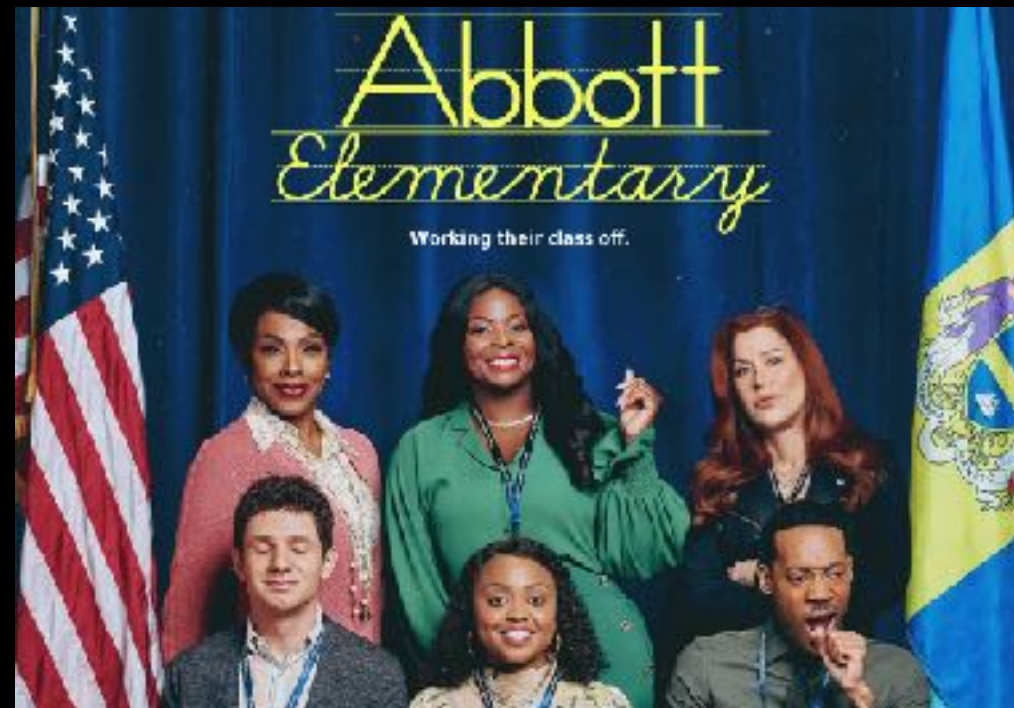


Following Russia's invasion of Ukraine, President Volodymyr Zelensky decided to stay and fight for his country rather than flee, despite being a key target for the Russian invaders. The US even offered him an evacuation, to which he replied, "The fight is here; I need ammunition, not a ride."



Ogilvy and the ERA Coalition joined together to take a bold new approach in the ongoing fight for women's rights in the US by launching WOMAN Corp, the first and only "woman" in America with rights the government will fight to protect.

FLIGHT MANIFESTATIONS



The award-winning sitcom centers around a group of underfunded yet dedicated Philadelphia public school teachers. TV and comedy typically act as forms of escapism from daily life, but given the show's subject matter and off-screen efforts to help under-funded schools (donating their marketing money towards supplies for teachers), the series serves as an example of how to reach escapists to shed light on and fight against an unjust world.

Rising prices in cities have altered migration patterns in the US. Across the country, there has been an increase in Black residents exiting cities like NYC and LA in favor of the South, citing rising cost of living as the main reason for their exit. The exodus is allowing many families the opportunity to build generational wealth and thriving communities. Rather than stay and suffer, their flight represents the search for something better.

In this limited series, Prince Harry and Meghan Markle share details about their high-profile love story and shed light on the reasons they left their life as working royals. The message is clear—they chose flight, seeing it as the only option to save themselves and their family.

Previously, when a brand promised hope, they provided **wishful thinking**.

Humans are now looking for assistance in their fight or flight. Brands that aid activism **wage wars** where necessary. Brands that aid escapism provide **wonder** where needed.

Each of the following shifts that this report explores is a manifestation of how we are choosing *fight* in some instances *and flight* in others, and how brands can aid in the process.



SHIFTS OVERVIEW

5. CRAVING REALITY



1. BOUNDLESS IDENTITY



FIGHT OR
FLIGHT



4. SEEKING EXPANSIVENESS



2. INFORMATION IS POWER



3. PROTECT YOUR PEACE



BOUNDLESS IDENTITY

The disruption of social structures in the last few years caused many to re-examine who they are and what makes them, them.

For many, this meant a shift towards fluidity in many aspects of their lives. People want to be able to identify themselves without any limitations: asserting that the whole of themselves is greater than the sum of their parts.

As a form of activism, boundless identity means expressing whoever you are, even in the face of mainstream opposition.

As a form of escapism, boundless identity means responding to your current reality by choosing to access different facets of yourself.



BOUNDLESS IDENTITY *BY THE NUMBERS*

OGILVY

75%

Of Gen Z rejects easy categorization of their race, gender or sexuality

(Hulu)

75%

Of Gen Z prefer companies with fluid organizational models where they can explore multiple roles

(Ogilvy Consulting)

56%

Of Gen Z buys clothes regardless of their gender marking

(Wunderman Thompson Innovation)

25%

Of Millennials considers themselves “forever renters” of homes

(Apartment List’s 2022 Millennial Home Ownership Report)

BOUNDLESS IDENTITY: MANIFESTATIONS



AirBnB launched its first hosting platform for apartment tenants in late 2022. The platform is starting with 175 buildings in 25 major cities. The move comes as the rental market continues to redefine the connection between ownership and identity, and signals the continual desire for flexibility amongst consumers.



As the digital world continues to blend with the physical, the possibilities of how to express oneself has become greatly expanded. AR beauty filters aren't confined by the constraints of reality, allowing its users to experiment like never before.

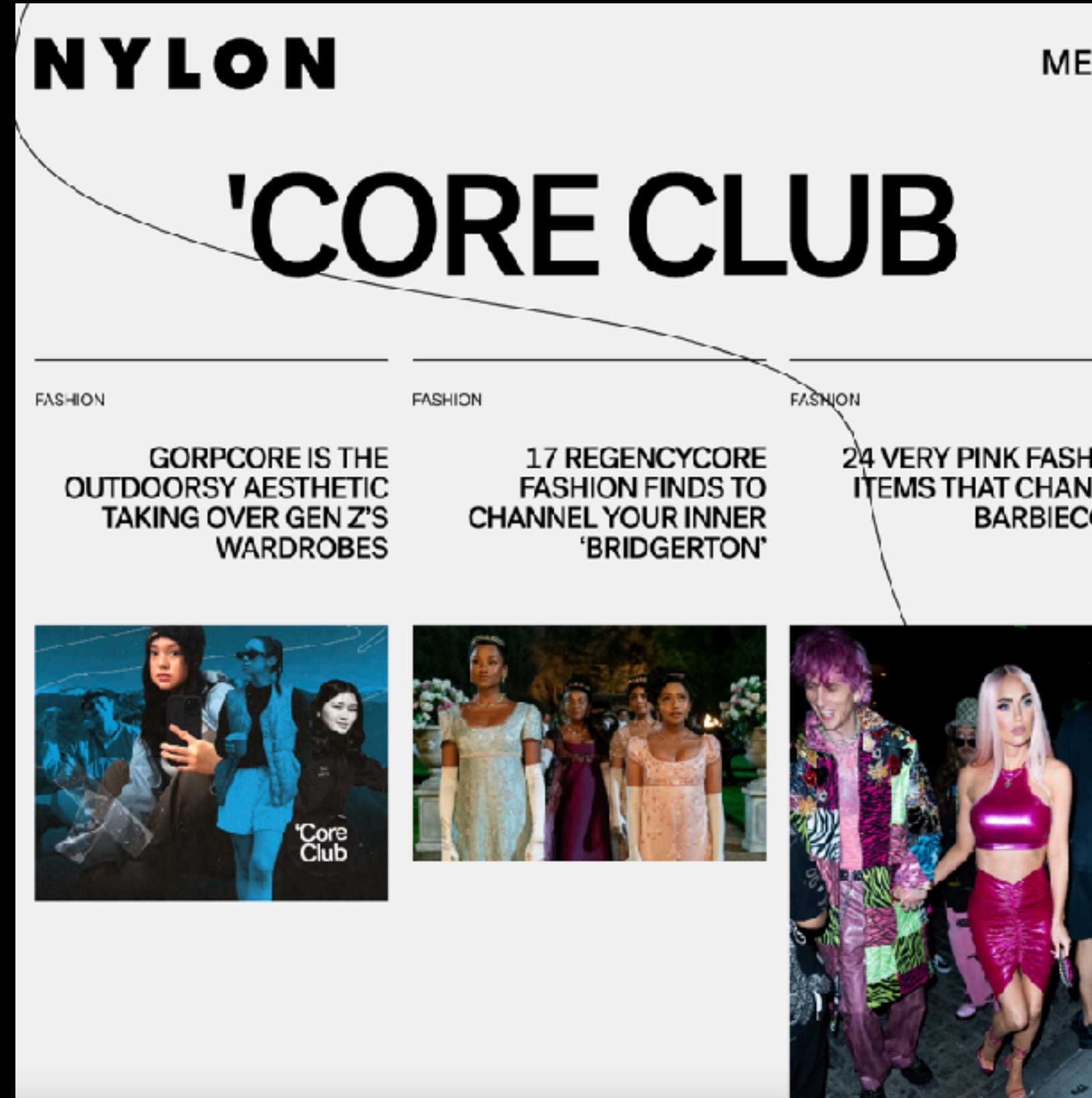


Named the #1 album of 2022 by Rolling Stone, Beyoncé's Renaissance experimented so heavily with genre that it subverts it altogether. Blending together dance, house, disco, pop, R&B and EDM influences, the album provides a look into the future of music in the age of streaming—one that is both genre bending and genre-less.

BOUNDLESS IDENTITY: MANIFESTATIONS



Taylor Swift is reclaiming her old “eras,” or distinct chapters of her life where she experimented with her persona, for “The Eras Tour.” Others are adopting the idea of “eras,” and naming distinct chapters of their life or facets of their personality—demonstrating the desire of individuals to both definitively label aspects of their life, as well as experiment with their persona and continually evolve.



Balletcore, cottagecore, fairycore, normcore, goblincore—take any word and add -core to it and you could start a new internet micro-trend on TikTok. Many are rejecting aesthetic-core culture—arguing that it encourages fashion waste as the need for ever-changing niche aesthetics encourages constant purchase desires.



More people are now opting into the “social omnivore” lifestyle—never eating meat at home but indulging in meat when out with family and friends. Those who partake aren’t using the marker in the same way stricter vegans or vegetarians may. “I don’t use this as an identity marker and I definitely am not trying to have any sort of ethical upper hand on my friends. If I don’t eat meat at home and then I decide to have bacon out, who cares?” Says Grace Perry, a social-only meat eater from LA.



Absolut & Ogilvy - The World of Absolut Cocktails. Born to Mix.

For Absolut's biggest global marketing campaign in over a decade, Absolut and Ogilvy teamed up to create the World of Absolut Cocktails, a distinctively diverse world in which cocktails are personified through dynamic, engaging characteristics that align with different backgrounds, adult life stages and characteristics, all of which showcases the versatility of the #1 premium imported vodka in the US.



Apple - The Greatest

With this spot, Apple not only highlights its new accessibility features but also the limitless nature of people with differing abilities.



Cheers to all fans

Heineken - Cheers to All Fans

This spot looks to redefine what a “football fan” looks like, celebrating all the football fans who are women and love the game just as much as their male counterparts. With its message, Heineken pushes for inclusivity in sports and for a reconsideration into how we picture a fan.

BOUNDLESS IDENTITY

TAKEAWAYS FOR BRANDS AND ADVERTISERS

SHIFT RECAP

CONSUMERS ARE LOOKING TO TRANSCEND LABELS

Fluidity and flexibility are at the forefront of consumers' minds. Whether at home, work, or in their personal lives, they are looking for more ways to shed the labels placed on them and instead be seen for all that they are. They are aligning with brands that can present them with more options and possibilities.

THOUGHT STARTERS

How can your brand meet younger consumers' desires for greater fluidity in their lives?

How can your brand support consumers in rising above labels?

In the strategy phase we often segment or create personas for consumers. How can that evolve given they are shedding these labels?

Can your brand subvert the labels and stereotypes attached to their name? Or can your brand help take down stereotypes from a group or situation?

KNOWLEDGE IS POWER

We once lived in an era of blind trust: brands were a black box and consumers took their promises at their word. In the age of the internet, consumers aren't content with this leap of faith.

Looking to take control of their lives, consumers are turning to information, education and transparency: equipping themselves with the tools to make educated decisions and take back the reigns on life. When you use knowledge as a shield, you can take on anything.

As a form of activism, this means acquiring new skills and information to solve problems in your life.

As a form of escapism, the overabundance of information can lead to us craving an escape.



KNOWLEDGE IS POWER *BY THE NUMBERS*

85%

Of Gen Z plans to learn a new skill in 2023

(Instagram Trend Report)

1/4

Of social media users want to increase their financial literacy

(Instagram Trend Report)

74%

Of workers age 45 to 74 say the opportunity to learn something new is critical to their view of the ideal job

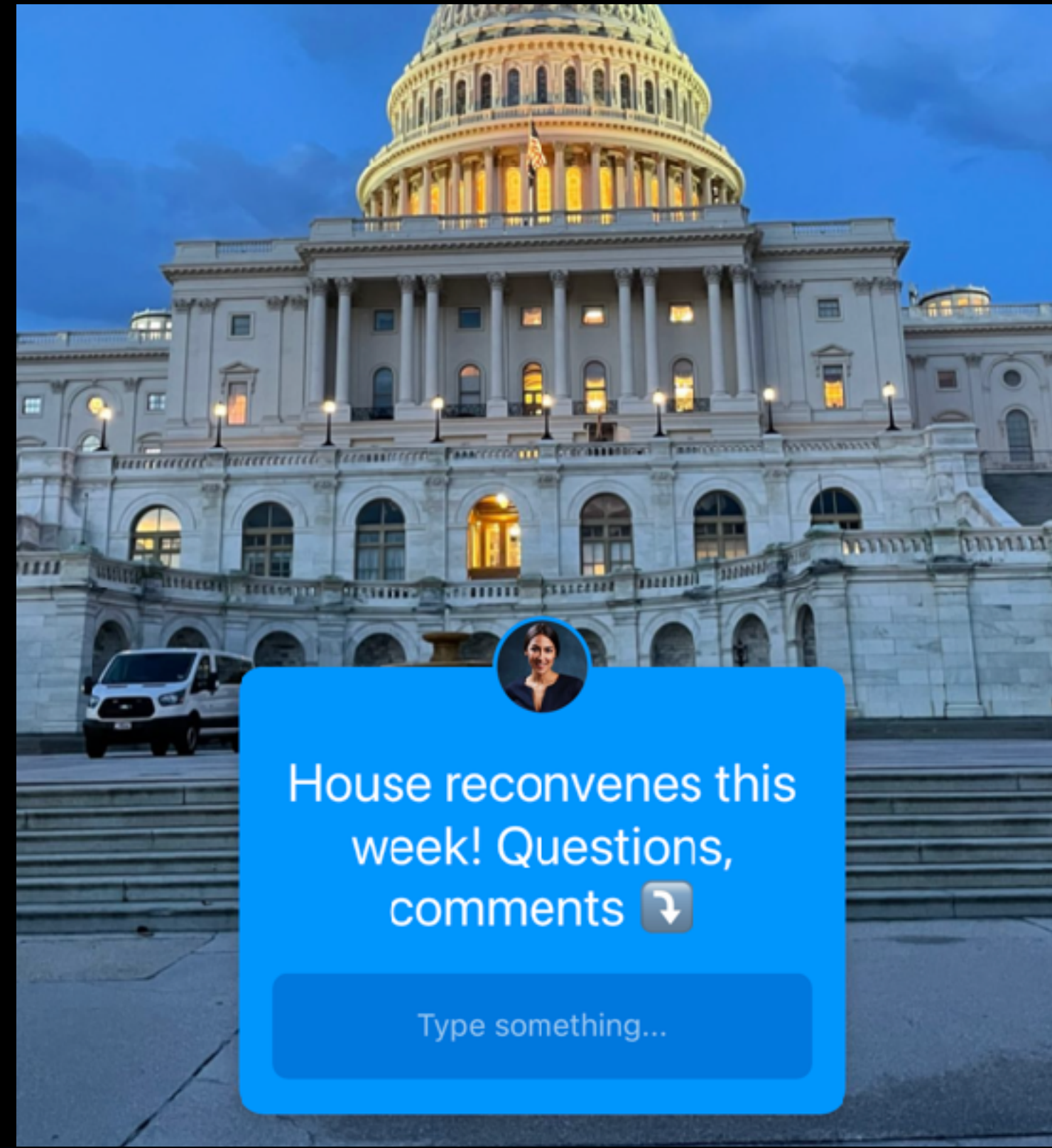
(Kantar)

51%

Of global consumers believe “learning things and growing” is one of the top 3 important benefits of the internet

(Kantar)

KNOWLEDGE IS POWER: MANIFESTATIONS

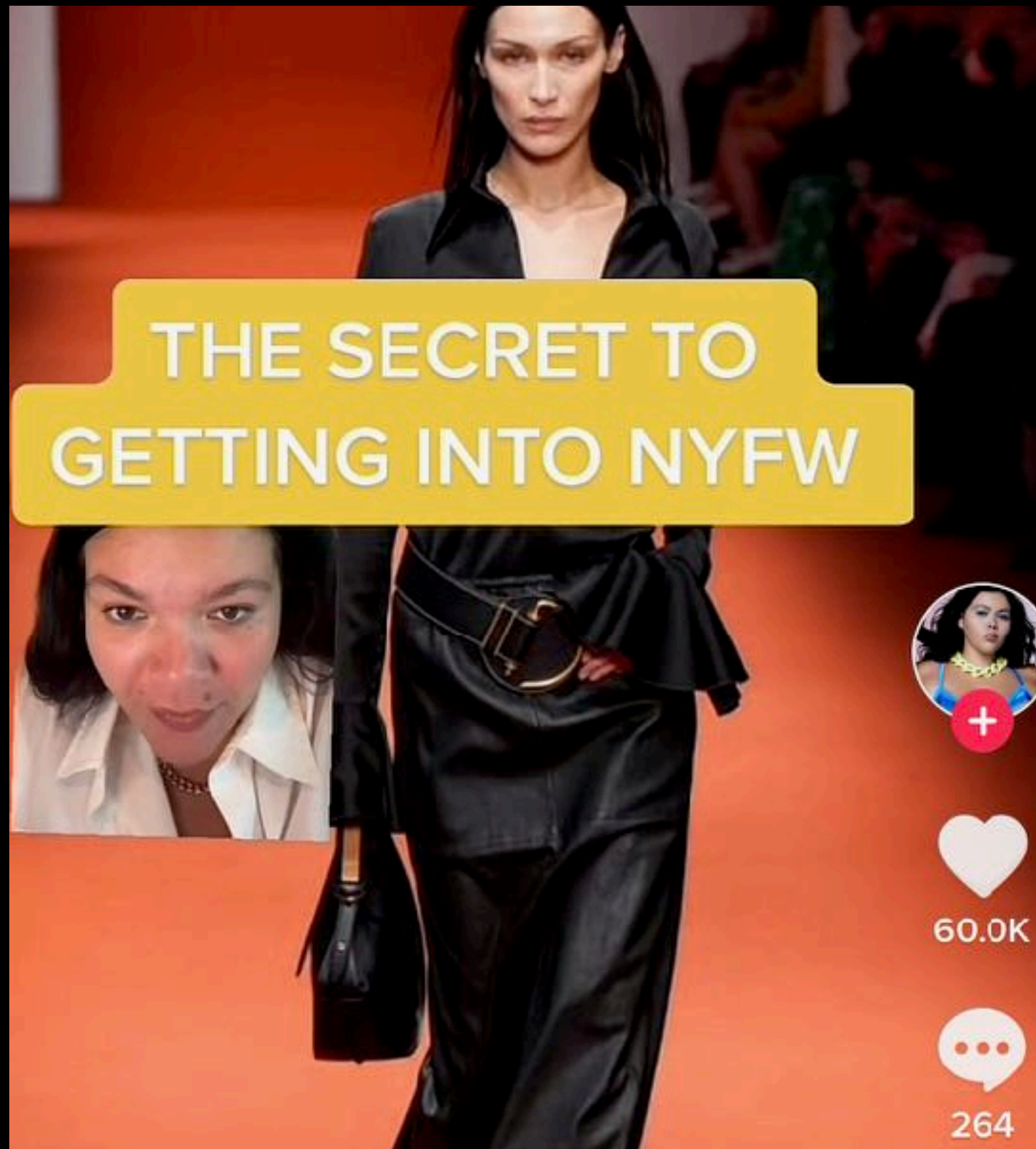


Allbirds provides its consumers with valuable information by maintaining incredibly high levels of brand transparency on their factory process, worker relations, and environmental policy. Taking it one step further, Allbirds made their carbon negative foam open sourced, allowing for other shoe companies to share in their positive environmental impact.

Just as consumers are expecting more transparency from businesses, they are expecting more from politicians as well. Alexandria Ocasio-Cortez, a New York Congresswoman, answers to this call by answering questions for her 8.6 million followers on her Instagram story. Other politicians have also followed suit, no matter what side of the aisle they sit on.

With the rise of streaming, the documentary has seen a popularity boom—resulting in the bingeing of documentaries and docuseries on true crime, sports scandals, cults, and more. This reflects the desire of consumers to learn more and understand the world around them, even when it comes to niche and potentially disturbing topics.

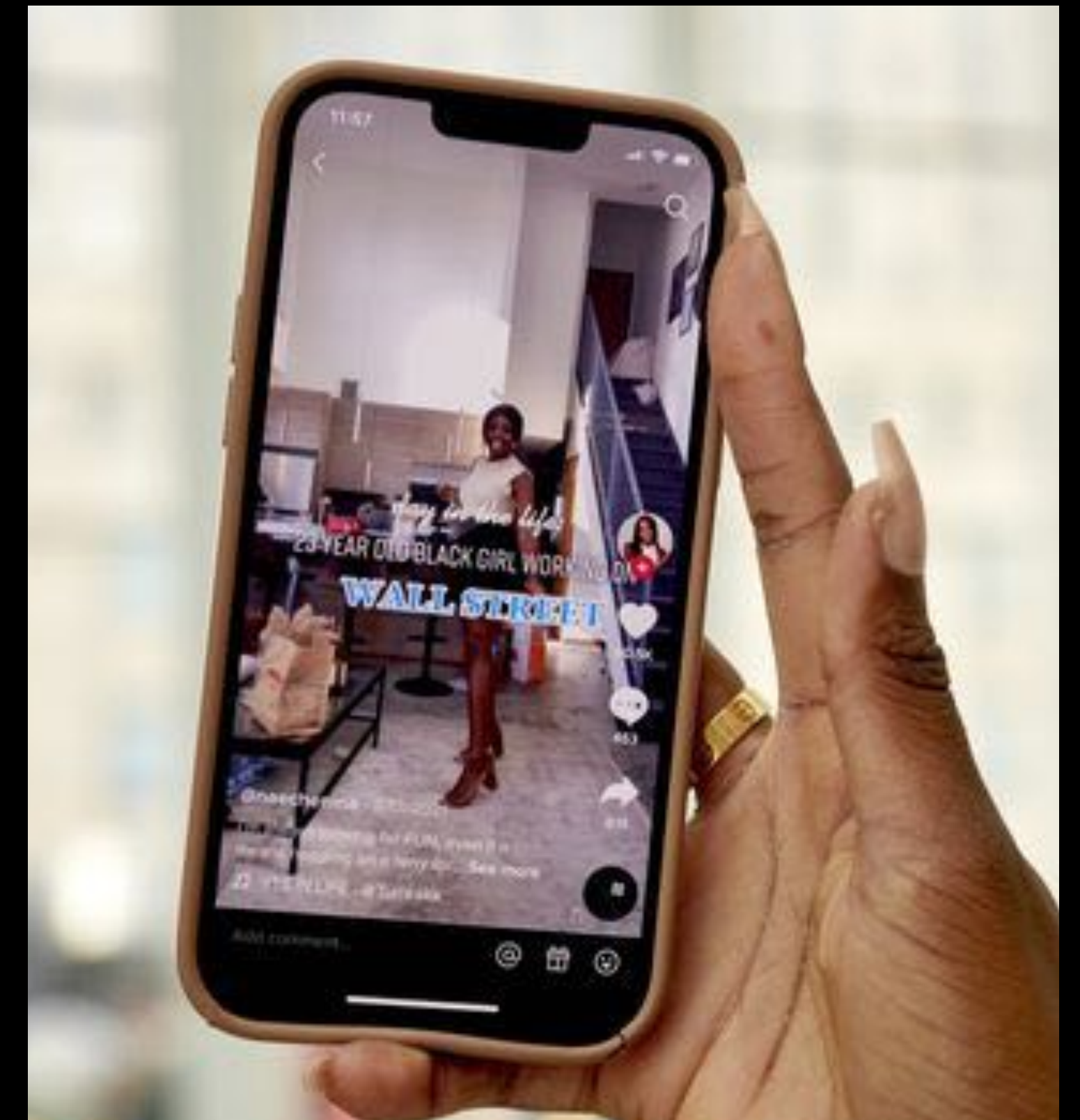
KNOWLEDGE IS POWER: MANIFESTATIONS



New York Fashion Week has been democratized by TikTok users. Famous TikTokers shared videos on “How to get invited to NYFW,” leaving publicists during Fall NYFW completely overwhelmed with requests. This circumstance reflects the growing dislike of “gatekeeping knowledge” and how people are seeking information to gain access into coveted spaces.



It's not just brands that are expected to be transparent about their roots anymore, but celebrities, too. The internet's obsession with “nepotism babies” is both a result of lighthearted discourse and the growing push for transparency behind privilege. People want to know how successful people got there—both to learn how, and to justify why they haven't gotten there themselves.



Gen Z has grown up sharing their lives on social media. For Wall Street, an industry known for its secrecy, this poses an issue. Popular day-in-the-life videos on TikTok help expose the industry to young and diverse talent, but also can shed a bad light on big banks by showing the true work expectations behind the scenes.



TikTok - TikTok Taught Me

This spot highlights the most valuable aspect of TikTok: the ability to share knowledge with others.



John Lewis - The Beginner

This spot demonstrated the importance of knowledge in connecting with others. When we're able to learn something for others, we are able to show them we care.



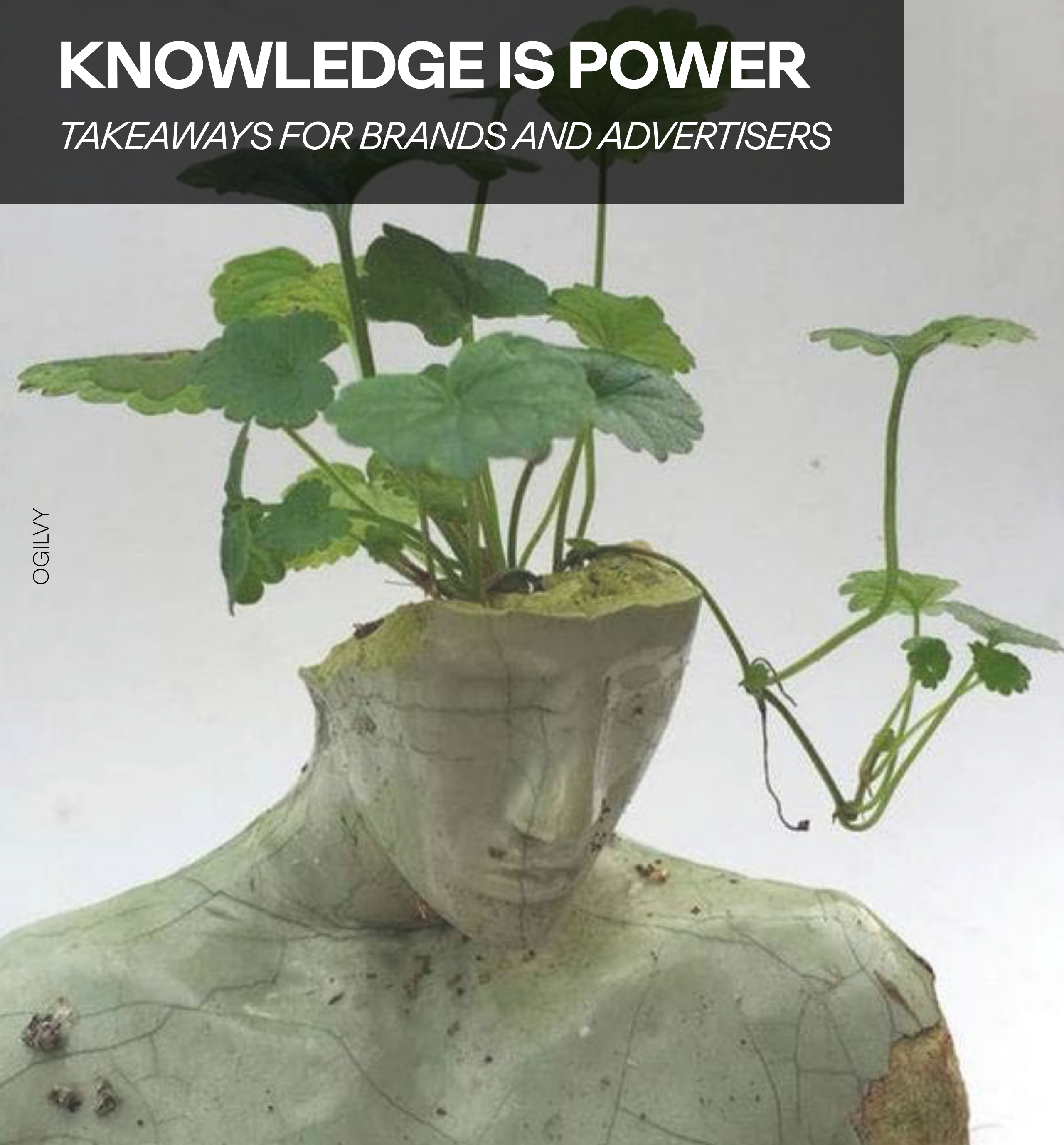
Citizens Bank – The Living Portrait of NYC

Looking to carve out their place in a new city, Citizens and Ogilvy teamed up to create the Living Portrait of NYC, an immersive experience that connected with people by touching on the human craving for information.

KNOWLEDGE IS POWER

TAKEAWAYS FOR BRANDS AND ADVERTISERS

OGILVY



SHIFT RECAP

CONSUMERS ARE SEEKING OUT MORE INFORMATION

Looking to alleviate their anxieties about the world, consumers are equipping themselves with knowledge in order to control what they can. They are expecting businesses, institutions, and public figures to supply this information, as well as looking to learn new skills to enhance their life.

THOUGHT STARTERS

There's no longer such a thing as oversharing. What processes could your brand be more transparent about?

Knowing that certain consumers are going to do the due diligence to investigate your claims, how can your brand:

- a. Make that information readily available?
- b. Ensure your business practices are backing up those claims?

Does your brand or product offer a way to enhance people's lives through a new skillset?

Is there a way for your brand to use data to expose a problem?

PROTECT YOUR PEACE

We live in a time of harsh political divides, a global recession, a terrible war and continuously emerging health threats. As a direct opposition to the constant threat consumers feel they are facing in today's world, they are arming themselves with protections.

Looking to safeguard their physical and mental health, livelihood, and families, consumers have created a new form of self care.

As a form of activism, protect your peace means fighting to safeguard your chosen reality.

As a form of escapism, protect your peace means withdrawing as a way to put yourself first.



PROTECT YOUR PEACE *BY THE NUMBERS*

47%

Of respondents say “I am prioritizing my mental wellbeing now more than 12 months ago”

(Kantar)

300%

Increase in birth control prescriptions following the reversal of Roe v. Wade

(Thirty Madison & Nurx)

63%

Of gun owners cite the main reason for ownership as “personal protection”

(Pew Research Center)

52%

Of people are setting more boundaries about emotional needs

(Bumble 2022 Survey)

PROTECT YOUR PEACE: MANIFESTATIONS

18 Anti-Pollution Skincare Products You Should Be Using Now

— *Because dull, dehydrated skin is not a good look.*

ELLE BY ELLE BEAUTY TEAM 18 MAY 2022



Consumers are now treating their climate anxiety by “pollution-proofing” their skin—investing in skincare or beauty products that protect against the dangers of the environment. 2/3 Gen Z shoppers plan to buy skincare products that protect against extreme weather or sun, according to the Instagram 2023 Trend Report.



Fashion house BALMAIN’s utilized body armor, tactical gear, protective wear, and compression pads in their Fall22 collection to propose “an armor against online image dysmorphia.” The theme of protective gear and hoods could be seen throughout Paris Fashion Week, signaling a greater desire for protective fashion.



The new focus in the fitness space is mental fitness. More gyms are moving towards introducing gentler classes like yoga and meditation, as well as rolling out “recovery” rooms with massage lounge chairs, self-massage gadgets, and designated nap time. 24 Hour Fitness says it has increased its recovery classes 33% since the summer of 2021 as demand has surged.


PROTECT YOUR PEACE: MANIFESTATIONS





OGILVY

“Quiet quitting” has been stirring up conversation across social media. The term represents the idea that workers who feel burnt out do not need to go above and beyond at work, but instead do the bare minimum. It’s a renouncement of hustle culture—something businesses are afraid of, while “quiet quitters” see as a protection of their boundaries and mental health.

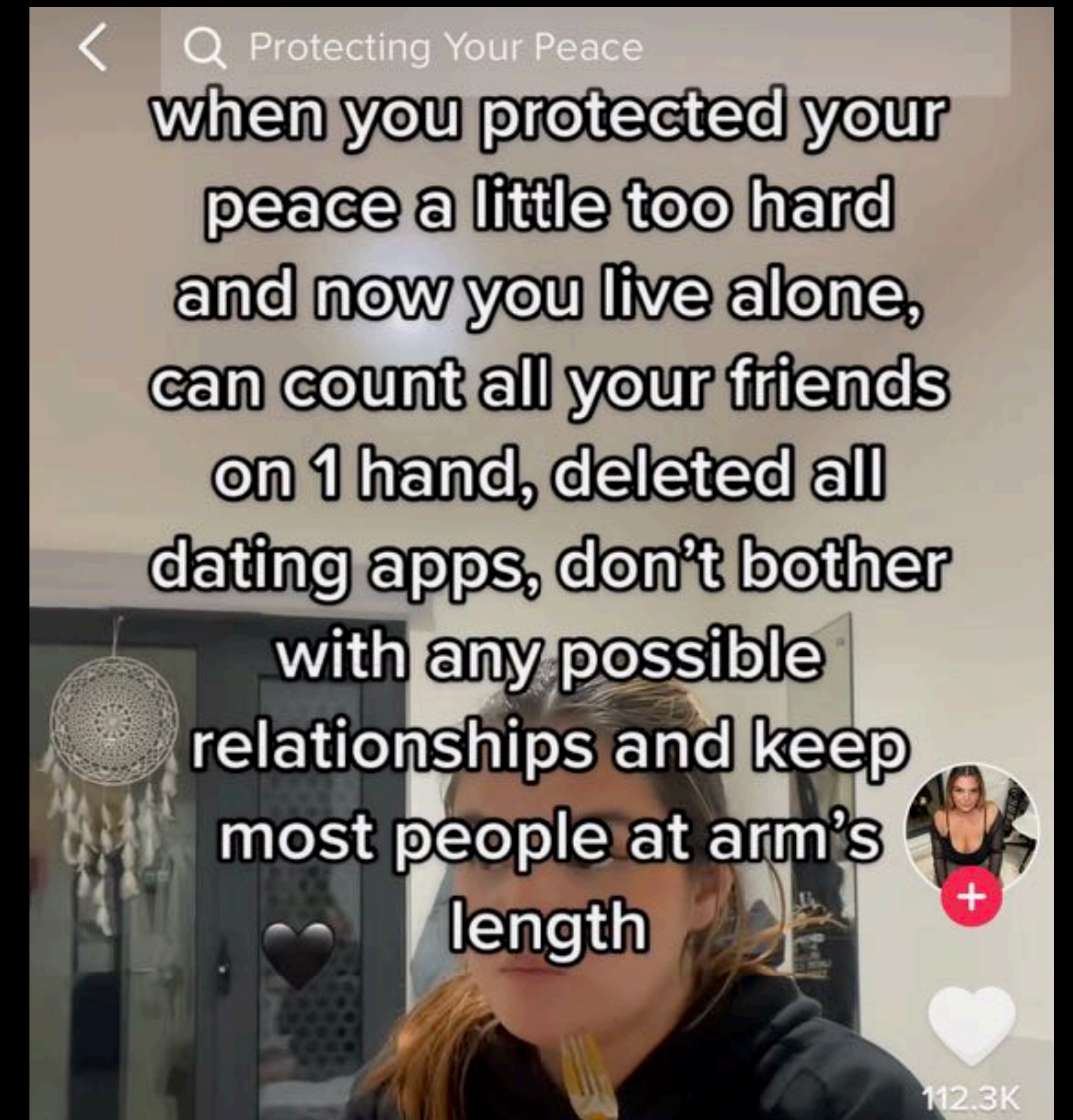
Need a walk home?

 **STRUT SAFE**
Mobile
0333 335 0026

@strutsafe

If you feel unsafe while walking home alone anywhere in the UK, you can call Strut Safe, a helpline to help people get home unharmed. In Edinburgh, the organization will send two volunteers to accompany them, and elsewhere in the country the dispatcher will stay on the phone with them until they reach their destination. Not only is this free service meant to keep people physically safe, but also help reduce anxiety and protect people’s mental health on the way home.



TikTok users are sharing what happens when you “protect your peace a little too much” via a viral trend that highlights the negatives of isolating yourself in an attempt to protect your mental health. The trend is a humorous yet cautionary tale of hyper-independence, but nevertheless highlights the ongoing increase people of prioritizing themselves.

If you're 38, you have
about 42 holidays left.

PLUM GUIDE
NO TIME FOR AVERAGE STAYS

Plum Guide - No Time for Average Stays

The OOH campaign uses simple stats to push viewers to use the time they have left, and use it well. The message encourages viewers to take time off for themselves.



Ring - Epic Showdown: Bear vs. Hummingbird Feeder

Ring is known for its doorbells and security cameras that can protect consumers and their homes. Yet, rather than just highlighting the safety features of their products, Ring shares their users' funny moments like unexpected animal visitors and impromptu dance parties on their YouTube channel. Sharing the funny moments captured with the camera rather than just the scary is representative of how you'll feel with a Ring camera—lighthearted and at peace.



Cadbury 5Star – Valentine's Day Alibi

The chocolate brand and Ogilvy India created this innovative campaign that attempts to save singles from the dreaded question, "What are you doing on Valentine's Day?" The idea that singles should escape to preserve their mental health is rooted in the idea of protecting one's peace.

PROTECT YOUR PEACE

TAKEAWAYS FOR BRANDS AND ADVERTISERS

SHIFT RECAP

CONSUMERS ARE PRIORITIZING THEIR MENTAL HEALTH AND WELLBEING

Consumers are looking to safeguard their physical and mental health against burnout, climate change, physical threats, and more. They are expecting brands to provide solutions for personal protection, as well as support this new form of self care.

THOUGHT STARTERS

Say goodbye to hustle and show-off cultures — people are looking to luxury for dopamine rather than status symbols. How can your luxury brand shift its messaging to meet this desire?

How does your brand protect its consumers? Are there certain features of your product that provide physical protection or just peace of mind?

If your brand speaks to mental health, does the internal work culture match this message?

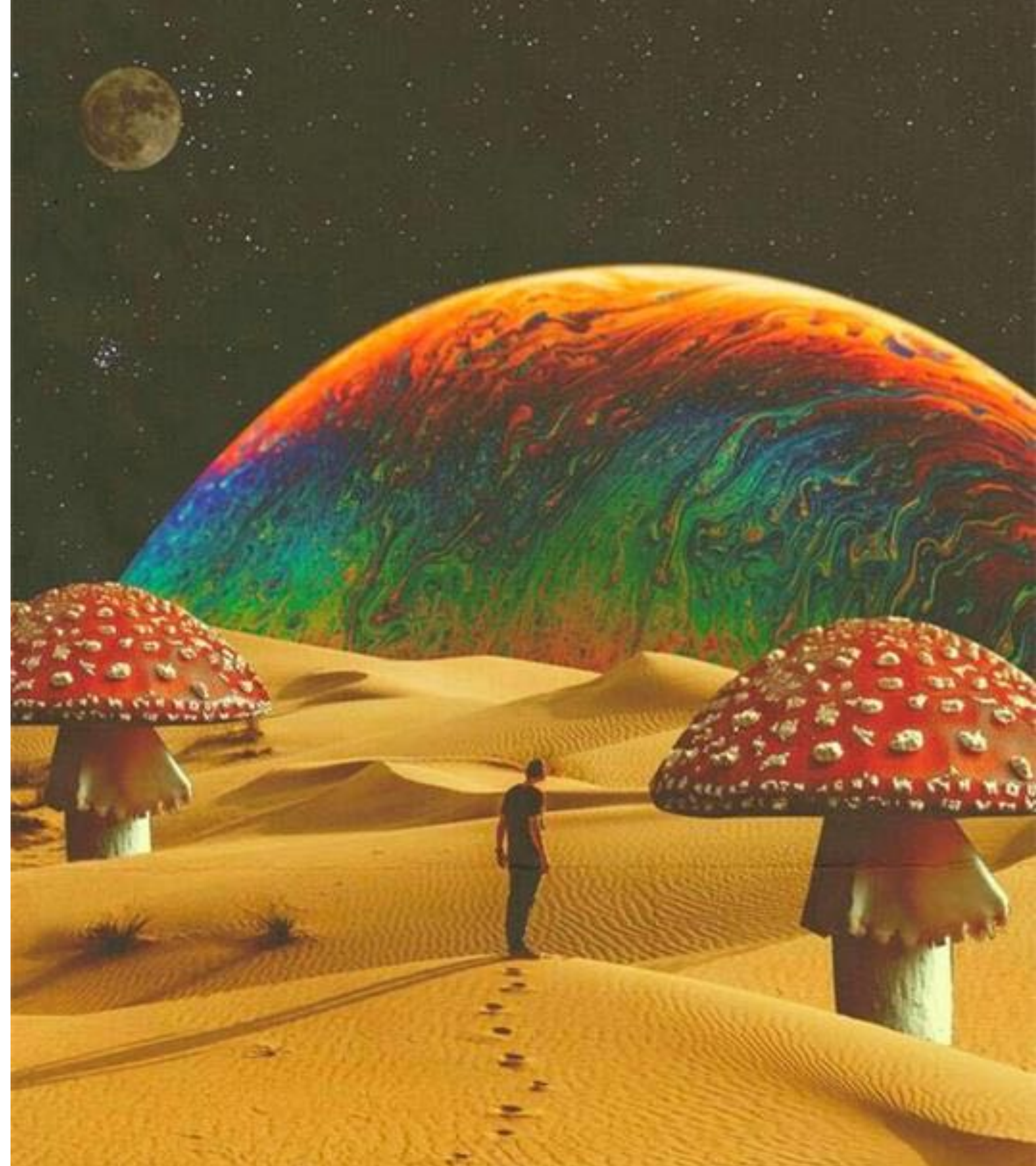
SEEKING EXPANSIVENESS

Coming out of the pandemic pause, humans are looking to explore new frontiers and add new dimensions to their lives.

When we couldn't go outside, the Metaverse was born. When we felt a lull in technological development, AI came onto the scene and vowed to change our world as we know it. When faced with limits in your reality, we have a natural desire to search for more.

As a form of activism, seeking expansiveness means fighting for the establishment of new frontiers.

As a form of escapism, seeking expansiveness means using those new frontiers to leave real world issues behind.



SEEKING EXPANSIVENESS *BY THE NUMBERS*

50%

Of case studies submitted into the digital craft category at the 2023 Cannes Lion International Festival of Creativity used ChatGPT, AI, or machine learning.

(Cannes)

76%

Of people who know what the Metaverse is want their avatars to express their creativity in ways they can't in the physical world.

(Wunderman Thompson Intelligence)

1/3

Civilians indicated they were either “very” or “somewhat” likely to participate in civilian space travel

(Morning Consult)

1,400%

Increase in the number of “unicorn startups,” which are private startups with a valuation over \$1 billion, from 2015 to 2023 (80 to 1,200)

(CB Insights & The New York Times)

SEEKING EXPANSIVENESS: MANIFESTATIONS



ChatGPT: Optimizing Language Models for Dialogue

We've trained a model called ChatGPT which interacts in a conversational way. The dialogue format makes it possible to answer followup questions, admit its mistakes, correct premises, and reject inappropriate requests. The model is trained to follow instructions in a prompt and provide a

Since it entered into the public domain, the Metaverse has been propped up as the new frontier. The World Economic Forum is using the tech for public good with the Global Collaboration Village, a virtual Swiss town to serve as a year-round meeting ground for Davos' stakeholders. The WEF hopes to "revolutionize global collaboration" with the virtual space.

ChatGPT, a powerful AI bot that engages in human-like dialogue based on a prompt, was released by OpenAI in November of 2022 and is taking the world by storm. A NYTimes opinion article discussed how the chatbot could unlock student creativity, offer personalized tutoring, and better prepare students to work alongside A.I. systems as adults.



Starlink, SpaceX's satellite internet constellation company, launched the first all-private space station mission. Elon Musk commented on the motivation behind the launch, "Satellites are nice, but flying people are special and a little bit different, and the team sure understands that. There's a sense of relief and a sense of accomplishment that you know you've done something good." To Musk, sending humans into space counts as doing "something good."

SEEKING EXPANSIVENESS: MANIFESTATIONS

OGILVY



People who live with depression and anxiety are seeking new solutions. Brands like Mindbloom are presenting them with an alternative to traditional prescription drugs: ketamine. The drug is now being used to literally expand the brain: acting like a fertilizer for the brain by restoring and strengthening connections between neurons that were damaged by chronic anxiety or depression. The drug represents an expansion in mental health solutions.



Apple unveiled the Apple Vision Pro Headset in June of this year, a “revolutionary spatial computer that seamlessly blends digital content with the physical world,” providing an “extended reality” experience. As consumers can now be immersed in both the online and real world, the tech signals the human desire to put one foot in an expanded world, but also to keep one foot in the real world—as opposed to traditional VR headsets that block out the real world entirely.

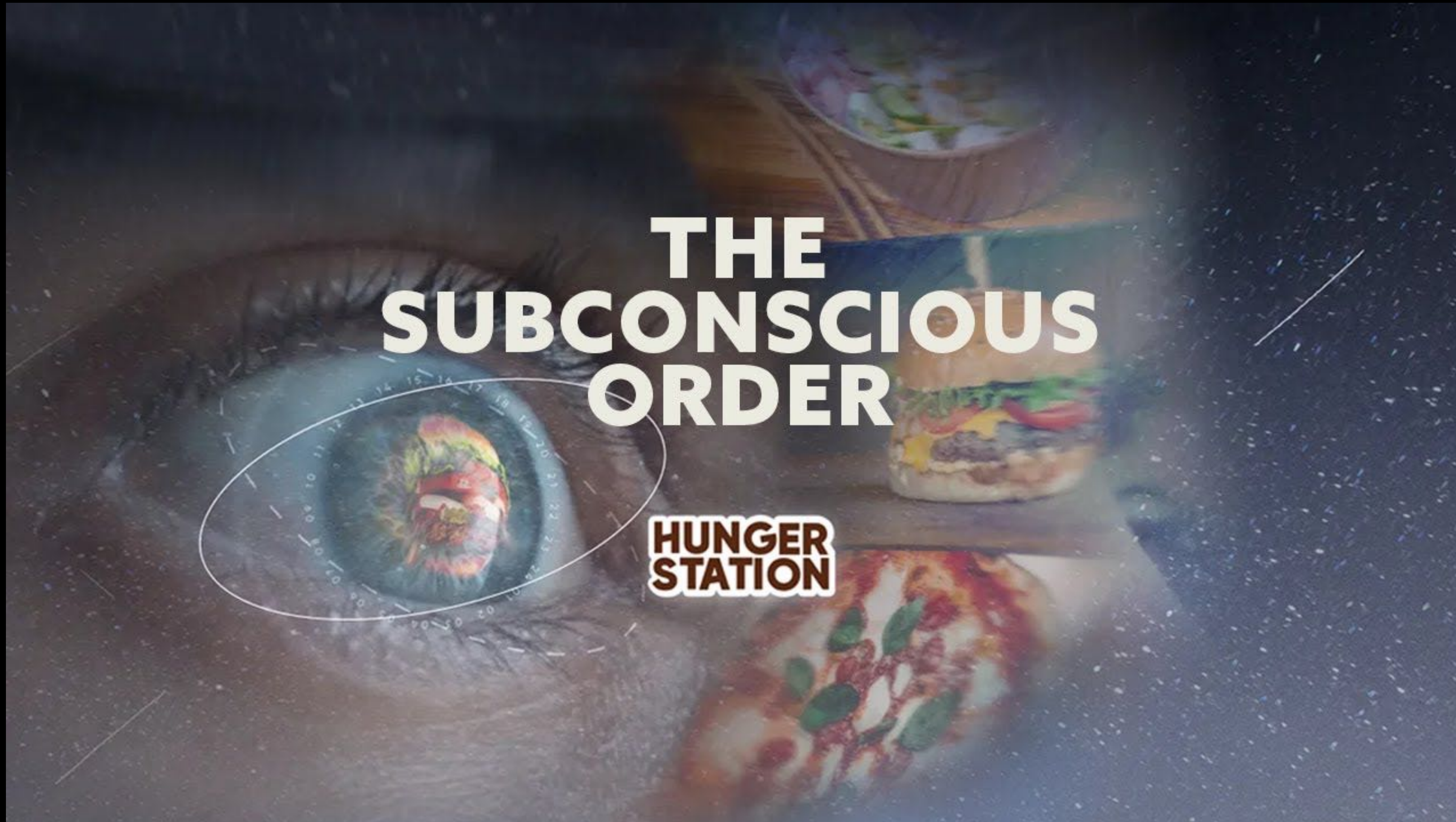


Autonomous cars have been lauded as the future of automotive and now concept cars from brands like Tesla, Audi and more are pushing the traditional limits of the driving experience. The innovation showcases the brands' desire to expand the possibilities of driving, even if society isn't quite there yet.



Woods Art Institute - The Art of Trending

Looking to expand the way we can respond to culture with art, the Woods Art Institute took trending words on social media and used AI to turn them into pieces of art.



Hungerstation – The Subconscious Order

Looking to tackle the issue of food ordering choice paralysis, Hungerstation and Wunderman Thompson Riyadh used eye-tracking analysis to make an ordering decision for a consumer by determining which food images resonate with consumers' subconscious cravings. The tech expanded the capabilities of a food ordering platform to guess what consumers want before they even know themselves.



Nestlé x Ogilvy Paris - La Latière

This spot uses DALL-E 2's new outpointing AI function to expand Johannes Vermeer's iconic painting, "The Milkmaid." The campaign was created to "leverage science" and embrace the "revolution" of AI, placing Nestlé at the center of the conversation.

SEEKING EXPANSIVENESS

TAKEAWAYS FOR BRANDS AND ADVERTISERS

SHIFT RECAP

BRANDS ARE PROMISING GROUNDBREAKING CHANGES

Looking to recreate the burst of excitement and newness that comes with disruptive innovations, brands are pushing new products and promises onto consumers—sometimes before they are ready for it.

THOUGHT STARTERS

Brands are often eager to dive into new, hype-worthy tech, from AI to crypto. If you're curious about branching into a new frontier,

When new tech goes viral, brands want in. But when all brands are joining the metaverse, getting into crypto, or utilizing AI, consumers can see through the gimmick.

If your brand wants to tap into a new tech trend, consider: does this make sense for our brand? Is our brand one that promises innovation, something that aligns with this new tech? If not, wait it out.

Is your brand one that could expand its category? Is there a product that when added to your portfolio could expand that category?

How can you communicate this expansion to consumers?

CRAVING REALITY

Digitization, curation and isolation have taken over our lives. To counteract that, people are craving realness—they want things to be genuine, filterless, raw. They are rejecting the facade and reaching for something that feels real.

The dislike of monopolies and billionaires signals the end of the "move fast and break things" era—people are catching on that what glitters isn't always gold, and instead yearning for real people and real brands who get where they are with hard work, not by cutting corners or cheating.

As a form of activism, craving reality means choosing humanity and rawness over robotic perfection.

As a form of escapism, craving reality means reverting to "simpler times" as a refuge from our evolving world.



CRAVING REALITY *BY THE NUMBERS*

OGILVY

64%

Of people say they've cut back on using some social networks because they are too toxic

(Kantar)

73%

of 18- to 44 year-olds say they now find influencers vain and annoying

(Marketing Week)

33%

Drop in player base over eight months in Horizon Worlds, with less than 200,000 monthly players by end of 2022

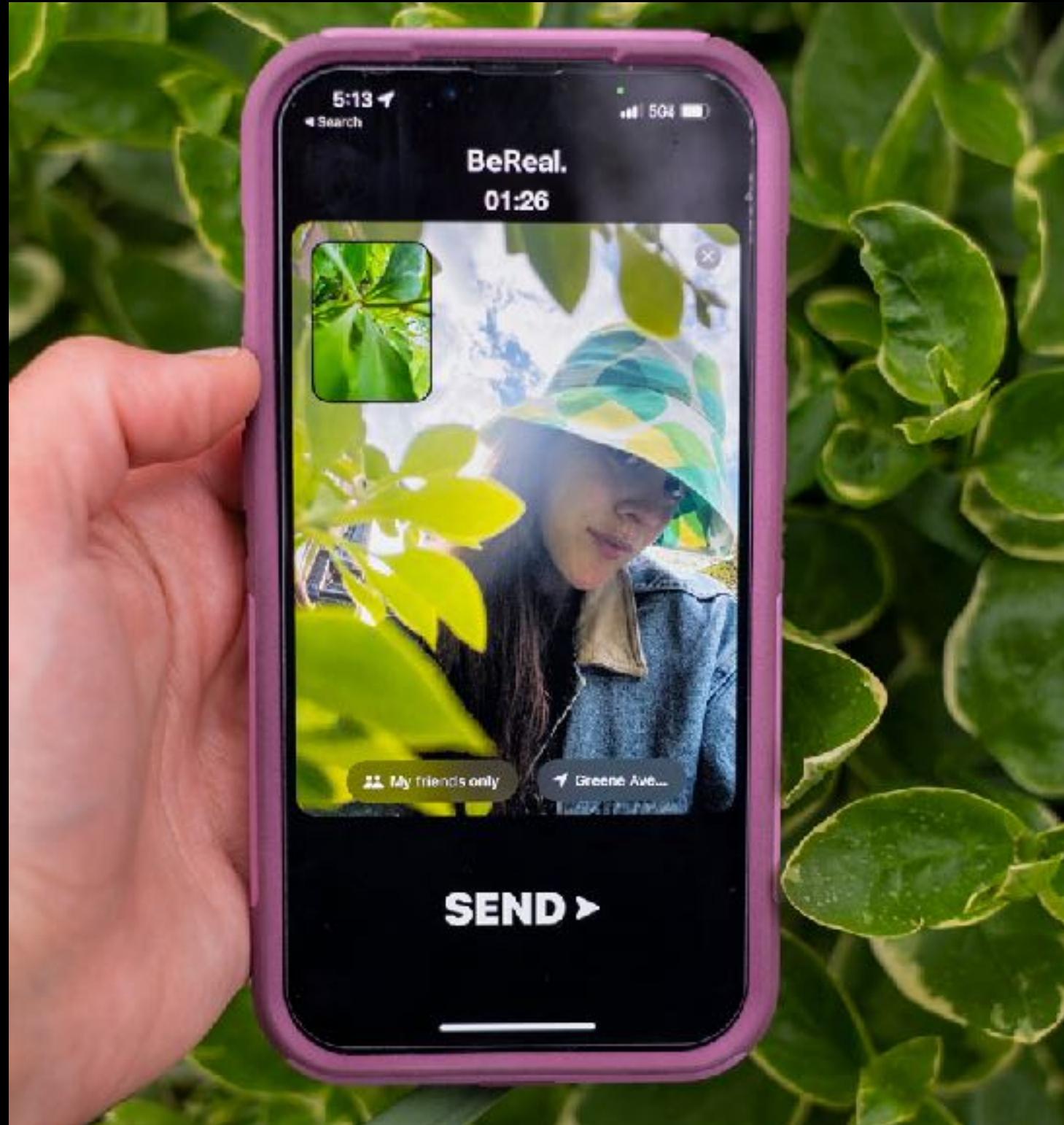
(Metaversed Consulting)

77%

Of global consumers like to "spend time outdoors in nature" to maintain or improve their mental wellbeing

(Kantar)

CRAVING REALITY: MANIFESTATIONS



BeReal, the photo-sharing app that has been positioned as “genuine” social media, changed the social media landscape when it blew up in 2022. The app has been downloaded over 100 million times since launch and has 20 million daily active users. Young users have flocked to the app, rejecting the curation and filters that make up other social media apps like Instagram and Snapchat.



64% of Gen Z expects to drink less alcohol than older generations do as they grow older—some cite the reason for their “sobercuriosity” as their health, while others refrain from drinking out of fear of “losing control.” Brands like Kin Euphorics are capitalizing on this shift, putting out “non-alcoholic social drinks” meant to “elevate your mood” and “stimulate clarity.”

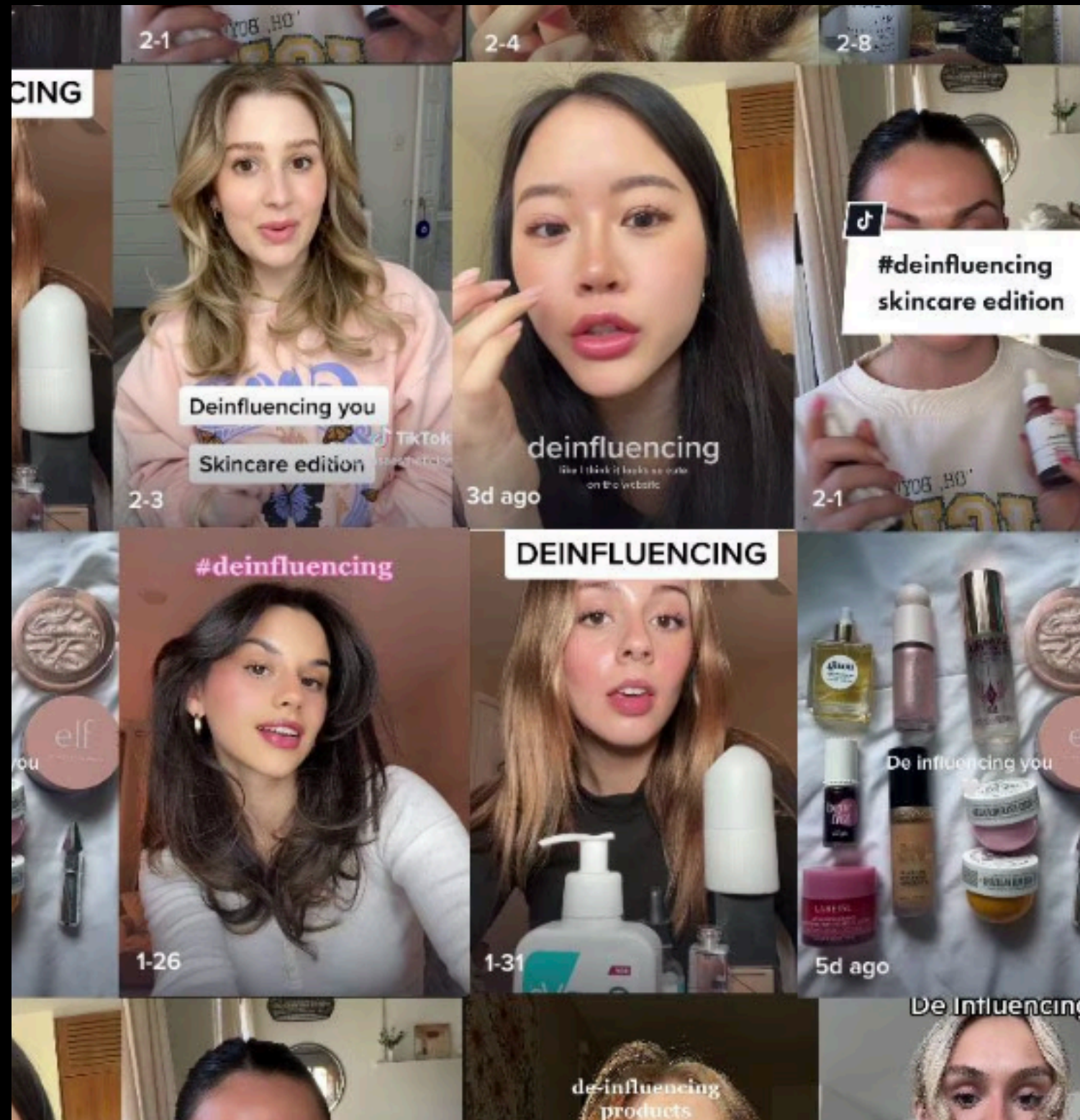


In a world of sponsored posts, people are turning to the Keith Lees. Lee has amassed over 13 million followers on TikTok with his honest reviews of struggling restaurants. He provides constructive criticism and always gives the restaurant another chance. Lee’s truthfulness and the fact he pays for everything himself has led many to trust his advice, turning struggling restaurants into overnight successes with one video review.

CRAVING REALITY: MANIFESTATIONS



In Brooklyn, a small number of teens are rejecting social media and technology, calling themselves “the Luddite Club.” The high school club encourages teens to ditch their phones—with some teens even downgrading to flip phones—and spend time together outdoors reading, writing, creating art, and exploring.



Fed up with the consumerist culture that has taken over TikTok, users are turning to a new trend: #DeInfluencing. The trend consists of users sharing things people should not buy and instead encourages them to save their money. The hashtag has accumulated over 433M views on TikTok.

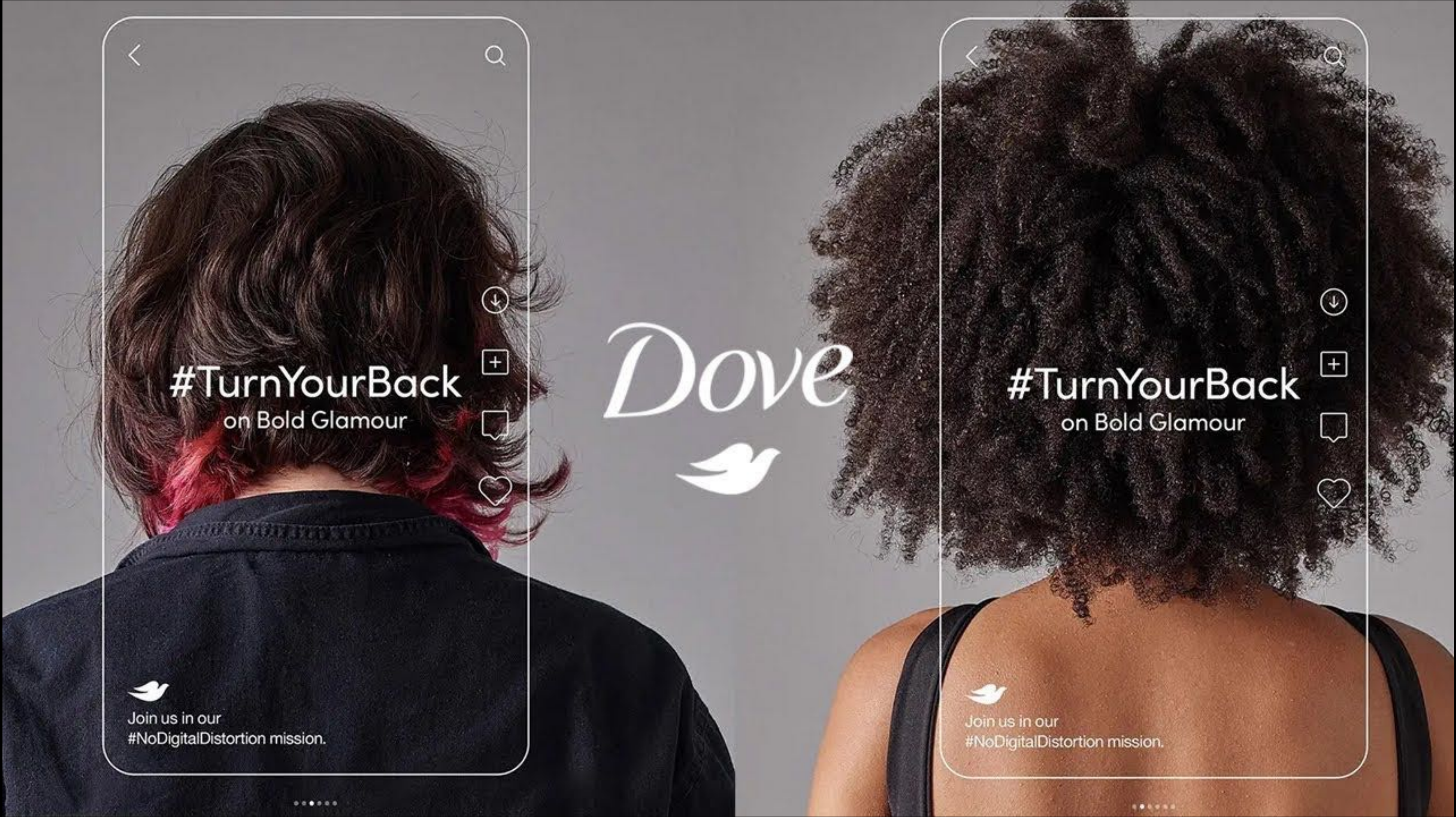


SXSW immersive experiences showed off new “soft” tech, describing it as “a more feminine kind of technology.” Marcel Van Brakel, codirector of the Symbiosis XR experience, says, “it’s air, it’s soft. It’s not your vibrating phone telling you your friend is calling.” Instead, soft tech uses “softer” senses like smell to involve “the whole body,” and create a more “organic” form of tech, one that’s less “masculine and harsh, aggressive, non-living.”



Salesforce - The New Frontier

Poking fun at people escaping to Facebook's Metaverse and billionaires jetting into space, Salesforce's 2022 Super Bowl spot brings viewers back to planet earth—addressing the company's commitment to fighting climate change and speaking to those who are looking for reality rather than technological gimmicks.



Dove - Turn Your Back

Launching within 72 hours of the harmful “Bold Glamour” TikTok filter’s release, the #TurnYourBack, campaign urged influencers, celebrities and everyday people to turn their back to their phone cameras in a bold statement that rejected unrealistic beauty standards.



Outside Interactive – The Outerverse

Outside Interactive launched the campaign in an effort to inspire people to spend more time outdoors and away from screens. Though Web3 is often perceived as “the antithesis of the real world” Outside used the emerging technology to do the opposite and enable people to get outside and build deeper connections outdoors.

CRAVING REALITY

TAKEAWAYS FOR BRANDS AND ADVERTISERS

SHIFT RECAP

CONSUMERS ARE LONGING FOR RAW, REAL, AND HUMAN

After two years of primarily speaking through screens, consumers are looking to return to reality. They are rejecting curation and rewarding authenticity. They are seeking brands that speak to this truth and honor it in their business practices.

THOUGHT STARTERS

It's easy for big brands to get caught up in curated and perfect campaigns, but this can leave brands feeling distant. How can your brand be more down to earth?

How can your brand pump more humanity into its core?

Many brands are looking to the future through tapping into tech trends like the metaverse, crypto, and AI. This can leave consumers feeling left in the past. How can your brand play into how consumers are connecting in the present?

SHIFTS OVERVIEW

5. CRAVING REALITY



1. BOUNDLESS IDENTITY



FIGHT OR
FLIGHT



4. SEEKING EXPANSIVENESS



2. INFORMATION IS POWER



3. PROTECT YOUR PEACE



THANK YOU!

QUESTIONS? REACH OUT TO:

ANTONIS KOICHEILAS - GLOBAL CEO OF ADVERTISING

ELISE ALVERSON - STRATEGY DIRECTOR

LAUREN NEFF - JUNIOR STRATEGIST