

dentsu

2022

Media Trends

Reimagine Next

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Introduction

The world is recovering from the pandemic and adapting to new ways of life, both in changed habits and behaviours, but also new rules for businesses to navigate to continue to prosper.

Necessity is the mother of invention. Times of crisis and recession have been, in retrospect, times of enormous opportunity and innovation, and times of growth for those who make the right decisions.

Technologies and ways of working that might have seemed an interesting experiment in other times have become essential.

In previous decades these moments have given rise to new media like radio, digital and social media, and been instrumental in the formation and growth of companies like Revlon, Uber and Airbnb. Again, the opportunity is out there.

In this report we look at three megatrends that are helping to define the recovery, each with smaller manifestations or sub-trends, with major implications for brands.

01

The Prolonged Pandemic describes the process of rapid adjustment, experimentation and innovation that is currently taking place as companies and consumers adapt to new ways of living, including new hybrid models in many parts of life, greater use of virtual worlds, and greater flexibility in working patterns.

02

Brand Citizenship examines how many brands are taking a more public-spirited approach to their manufacturing and marketing, using their knowledge and market power to help make the world more sustainable and fair.

03

Identity looks at how, in the age of the pandemic, it is more important than ever that people be able to prove who they are, but at the same time harder for brands and third parties to know who they are.

Media Leaders in Conversation



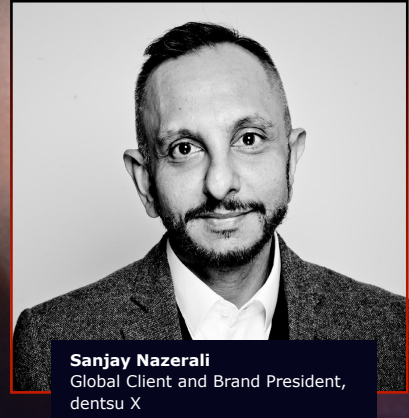
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Before diving into each megatrend, we sat down to discuss some of the key themes that have emerged from this year's report with Fiona Lloyd, Global Client and Brand President, Carat, Amanda Morrissey, Global Client and Brand President, iProspect, and Sanjay Nazerali, Global Client and Brand President, dentsu X. They share with us their unique experiences and perspectives, from professional and personal standpoints.

The past year has been eventful to say the least. What is the one change that has happened that you are looking forward to keeping permanent?

Sanjay Nazerali: When we all went into lock down, none of us knew what to do. We did not know how to work from home or exercise from home. We did not know how to look after our kids. Amazingly, some brands stepped up and helped us learn how to do this stuff. I really hope brands will keep this sense that their role is to help consumers.

Fiona Lloyd: The world feels more human, with much more emotional intelligence. You get to know your clients and colleagues better by seeing a full image of their faces on a screen.

Amanda Morrissey: Hybrid working has been a revelation. In the old world we spent all our lives on a plane, and it took much longer to crack international problems. Although it is lovely to have human contact, it is also great to have the diversity of perspectives and cultures you get from different people in different countries all in the same virtual space together.

When it comes to media, what was the most exciting or surprising change for marketers?

Lloyd: The desire to simplify how we do things. The pandemic made us evaluate every aspect of life both personally and professionally, and make decisions that might have taken far longer otherwise – just ripping the plaster off. We have made massive, brave changes that we would not have made otherwise.

Morrissey: The greater emphasis on ecommerce has really changed brands' relationships with consumers, both in terms of the experiences that we can build, and how we target. It has brought a fundamental shift in how we organise ourselves, what skills we use, and how we do business.

Nazerali: We think of the media becoming much more fragmented and atomised, but the surprising thing is we still have big shows that everyone watches, whether it be Tiger King or Squid Game. That has been really surprising and wonderful from my perspective.

Lloyd: It is all about understanding the consumer mindset and expectations within the different environments!



Media Leaders in Conversation

What are brands looking for most as we enter 2022?

Nazerali: Brands are looking to connect heart and head to tell wonderful stories and create compelling experiences, especially if they drive revenue. We are going to see more feelings and emotions, but also a renewed emphasis on measurability and accountability. If you have enough experiences with any brand and they're consistent and valuable, they will ladder up to the Holy Grail of all marketers: a relationship.

Lloyd: Brands are looking for radical collaboration, between us, partners, and other agencies to solve client challenges in completely new ways. There is also a much greater demand for diversity; it is completely unacceptable not to have diverse teams providing responses to briefs.

Morrissey: Brands want more omnichannel planning and buying, with more attention to what impacts different media have on each other, and how we reach audiences, measure, and optimise. It is about helping clients to organise their own structure so that the various parts work in tandem, using their data and technology to the best effect.

Where do you see the greatest opportunity for brands in their media for 2022?

Morrissey: There is opportunity in understanding how consumers live in both real and virtual worlds, and how and when they intersect. Media is really going to help brands not only build relationships today, but focus on where they are taking consumers tomorrow.

Nazerali: The biggest opportunity is to inject joy back into commerce, a sort of curated serendipity.

Lloyd: Bringing empathy and humour into our work and making sure that human understanding translates into a genuine value exchange. The trend was already here prepandemic, but it has been accelerated over the past 20 months. You can also see a real shift to brands and businesses that are empathetic.

This year saw a lot of news, then pausing, then more news on cookies. What positives do you see for marketers from the changes in cookie acceptance?

Nazerali: We have gone down a bit of a rabbit hole with personal identity, and we have assumed that someone's name, email address and all their data signals define who they are. That is not the whole truth. We are defined by the groups we belong to. When I go to my allotment, I am actually defined by the other allotment owners around me. When I go to work, I am defined by the colleagues around me yet my family are not defined by that group. The advantage in some ways of cookies not being available is that it will force marketers to start thinking about what are those things that bind people together at any given moment in time.

Morrissey: It has made us be more inventive. It has made us test and build solutions, and we have been much more experimental in the work we have delivered. We have also been able to talk to our clients more about data, including their own first-party data, and how that can be used most effectively. It's really all about signals: where consumers are and what they are interacting with, rather than a simple identity.

Lloyd: The truth is that having genuine insight and understanding of your customers leads you to better decisions!



Media Leaders in Conversation

The metaverse and gaming are both undeniable forces as we look forward – what is the promise of virtual worlds such as Roblox for brands?

Nazerali: I think the real opportunity for brands is to link the metaverse with the real universe and create that bridge between the two.

Morrissey: There is a retail opportunity in that we can sell things in these spaces, but more than that, there is a consumer opportunity and how we connect gaming and virtual worlds with everything in the real world. The media world has probably never been more complex or hard to measure, but there is also more potential for experimentation and testing than ever before.

Lloyd: To strike a note of caution, as a parent I struggle with gaming and the boundaries you set for your kids, particularly in terms of how much time they can spend playing. It is an ethical issue that we need to be mindful of.

How important is data going to be as we look ahead in changing commerce, in channels like CTV, and live-streamed shopping?

Morrissey: I think there must be clarity in terms of audience and insight, and then applying this to these channels. Historically when we thought

about TV the data was never real time, but now we will have the ability to react and optimise based on what is happening in the moment.

Nazerali: The data is going to be critical. It is going to drive efficiency. It is going to drive ROI, but I think the real opportunity will not be unlocked just through the data, but through the insight we derive from it, because it is those little bits of insight at the edge which large aggregate numbers often don't see.

And finally, what is one trend you do not want to bring into 2022?

Morrissey: The one trend I do not want to take into 2022 is the imbalance of home/work life. As we are now getting used to remote work, we need to find the right balance between work and home life when they might exist in the same physical space.

Nazerali: I completely agree – but I also want to make clear that I have never and I will never bake a cake. I do not care how locked down we are. I am not baking.

Lloyd: Agreed – and no more home schooling!



01

MEGATREND #1

The Prolonged Pandemic

01

MEGATREND

The Prolonged Pandemic

The pandemic is having far more impact, and is lasting longer, than almost anyone initially thought. The world has changed. The past 18 months have brought about a greater change in the way many people live, work, shop, and socialise than any time in the past 70 years.

As societies open up again, there are many promising signs of recovery everywhere we look from economic indicators to proxy measures like hire car usage and the number of weddings.

However, the world will not simply rewind to 2019.

We are already living in the new world, and need to be agile enough to continue to adapt to new habits and behaviours.

The pandemic accelerated trends that had already been rising, for example in digital usage, cashless payment, streaming subscriptions, time spent on gaming platforms, and, of course, the percent of commerce transacted online. We have seen greater adoption and use of digital hardware as people reacted to more time spent at home and upgraded their homes.

As we will see in the next pages, many leading brands are betting these changes are here to stay and are resolved to making the most of these opportunities by rolling out ambitious media strategies and transformation plans, supported by massive investments.



In this section we will look at:

- **Omnichannel Everything** - Hybrid models developing to provide online and offline options for entertainment, events, festivals and more.
- **New Ways to Buy** - The acceleration of new shopping services and technology, building on the rapid growth in online commerce.
- **Virtual Worlds** - The concept of virtual worlds becoming mainstream, and even - possibly - taking over from group video calls.
- **Secure Scarcity** - Technological advances making it possible to create unique copies of digital assets, and how this is generating millions in revenues.
- **Fans of Flexibility** - Greater flexibility within the world of work for those lucky enough to be able to work from anywhere.



MEGATREND #1

Omnichannel Everything

Consumers have become accustomed to the flexibility offered by omnichannel retail - the ability to research and buy both online and in-store, and combinations of the two. We now see many other areas of life becoming omnichannel, developing hybrid models that mix digital and in-person participation.

In the Cinema and in the Home

Entertainment is increasingly hybrid. Studios like Disney are releasing films in theatres and online at the same time. For example, Cruella was released both in cinemas and online in May 2021, generating a global box office of just under \$250m,¹ with streaming revenues, from an additional fee for Disney+ subscribers, reaching a bit under \$50m.² While these numbers may seem big, they are much lower than would have been expected from a high-profile theatrical release before the pandemic. Cinema chain Cineworld has reported a 70% fall in its US admissions,³ and while a combined model offers flexibility for film fans, it changes the economics for the industry.

Netflix is experimenting with physical entertainment. It has created live action experiences for two hit shows, Bridgerton⁴ and Money Heist,⁵ for which fans can buy tickets.

Omnichannel Everything

Events and festivals are also becoming hybrid. This year's Edinburgh Fringe Festival featured about 1,000 shows, of which about 600 were live in venues around the city, 100 were available to stream live at specific times, and 300 were available to stream on-demand.⁶ The flexibility allowed audiences to take part anywhere around the world, and also allowed performers to submit their shows to be part of the platform remotely. No figures have been made public, but inevitably the box office takings will be down; the festival normally has more than 3,000 shows.⁷

Flexibility First

IKEA took advantage of this trend when they hosted their global festival in-store and online in mid-September.⁸ Online elements included films, shows, and even DJ sets from famous DJs in their own homes. In-store elements included talks on wellness, and classes on how to upcycle and give older IKEA furniture a refresh.

Work is becoming hybrid for those lucky enough to be able to work effectively from home. Many offices are trying out new ways of working where people spend two to three days a week in the office, and the rest from home. Microsoft reports that its Teams collaboration technology now has 145m⁹ daily users. Some train companies are trying to help this by offering more flexible season tickets that are valid for only a few days a month.

INDUSTRY OUTLOOK: HEALTH

To learn more about how brands can create meaningful change through health innovation in the next years, download the report Health 2030 on dentsu.com.

Health is becoming hybrid, with new technologies allowing virtual consultations, and even apps that let people report their own health regularly, like the Covid Symptom Tracker.¹⁰ Again, this has been happening for a few years, but the pandemic rapidly accelerated adoption.

We expect this trend to expand to many other areas of life. As experiences blend online and offline, brands will want to either partner with or buy companies that will help them to control as much of the experience as possible. New companies will emerge that make it easier to manage and fulfil omnichannel experiences.

What Brands Can Do

Act as trusted guides during times of uncertainty and change.

Adapt to new patterns of living, taking new footfall patterns and media usage as cues for omnichannel media planning.

Explore new audiences who may enter the market as a result of the new models – for example, those living in different countries who can now become customers under hybrid models.



1.2

MEGATREND #1

New Ways to Buy

Commerce has seen great changes, many brought on by lockdowns. Digital has grown its share, for example, reaching a peak of 40% of all consumers sales in the UK in May 2021.¹¹ New services and technologies have emerged to make shopping even more convenient and omnipresent.

The Bring it to Me Economy

Grocery shopping has traditionally had low levels of online sales, but the forced experimentations of lockdown made many try it for the first time and experience how convenient it can be. It is now being blended with another lockdown staple, takeaway delivery, to create on-demand grocery shopping, with services from both established delivery companies like Deliveroo and Instacart, and also new entrants like Gorillas and Getir. The Financial Times reports that \$14bn has been invested in these companies since the start of the pandemic, including over \$8bn in 2021.¹²

All of these are offering limited numbers of products, both fresh and packaged, for delivery either from a dedicated hub, or an existing retailer in as little as ten minutes. Because inventory is managed, 'live' shoppers only see products that are available at the time of ordering; no substitutions.

This on-demand model is moving to other categories. In Germany, Arive offers products from a selection of lifestyle brands - including Apple, LEGO and Lululemon - for delivery within 30 minutes.¹³

1.2

MEGATREND #1

New Ways to Buy

INDUSTRY OUTLOOK: ONLINE GROCERY

To learn more about how new shopping behaviours have transformed the grocery landscape, and discover which initiatives key players in the space are launching in order to meet new challenges, download the report [Industry Outlook: Online Grocery on dentsu.com](https://www.dentsu.com).

Online Commerce Becomes Live & Immersive

Commerce is also becoming more embedded into content, finally delivering the promise of shopping within social media. Snapchat, TikTok and Facebook (including Instagram and WhatsApp) added more ways for merchants and influencers to sell on their platforms, and ways for users to set up payment and delivery details to make buying more seamless.

Facebook reports that more than 1bn of its users regularly access its local shopping service Marketplace,¹⁴ and Mark Zuckerberg recently revealed that there are more than 1m stores on Facebook's platforms, where 250m people interact with them.¹⁵

Live video shopping within apps has also arrived in the West in force, with both Facebook and Instagram promoting it with partners like Bobbi Brown, Clinique, and Sephora.¹⁶ This technology first took off in China, and Alibaba has started to offer its AliExpress live shopping apps in European countries, recruiting presenters to host shopping shows.

While AliExpress is significantly bigger in Asia than in the West - it is reportedly a \$60bn revenue channel¹⁷ - it is even becoming popular with niches. WhatNot is an app with a \$1.5bn valuation selling collectables like toys and trading cards through live video events.¹⁸

Shoppable CTV

The rise of connected TV has created the potential for integrated shopping on the biggest screen in the home. This time it is not through live video streams, although those channels still exist, but through letting viewers send information and shopping links seen on-screen to their mobiles. YouTube is currently experimenting with this in the US through new formats for people watching on their smart TVs,¹⁹ and in the UK, ITV partnered with LG to create shoppable content for their show Love Island.²⁰ Viewers watching an LG smart TV could get prompts when products appeared on screen, for example, clothing or cosmetics, and the opportunity to see more or buy on their phones.

Getting into the sci-fi area, YouTube is also experimenting with AI-based image recognition technology that is capable of identifying products in videos that people watch, and then recommending those products.²¹ For example, if someone was watching a baking video the tech could recognise a food mixer, and the next time the viewer logged into YouTube they might be presented with recommended products as well as recommended videos.

1.2

MEGATREND #1

New Ways to Buy

Netflix does not run advertising, but it is possible to imagine technology like this being part of the service at some point in the future, particularly around their more reality based programmes. It has already created an online store to sell products inspired by shows; could they be planning to offer on-screen buying?

Some of these new ways to buy are currently very limited in geographical or technological scope, but as we have seen with the rapid rise of services like Uber (from launch to 300 cities in 5 years²²), or technologies like augmented reality (currently 1.5bn users, projected to rise to 4.3bn in 2025²³) growth can be very fast.

Similarly, expect shopping to become easier, with the number of clicks needed to buy falling over time, and, in the case of the TV, the need to send details to your phone rather than buying directly falling away.

What Brands Can Do

Experiment with new ways to sell, testing in the most advanced markets to be ready for broader roll-out and adoption.

Target shopping and payment messages around these new contexts and keywords, rather than simply targeting page categories.

Include strong, brand-based messages, to balance with more shoppable ads.





1.3

MEGATREND #1

Virtual Worlds

Virtual interactions, whether in gaming or on video calls, have become perfectly natural to many. Gaming is booming in popularity, with more people getting used to the idea of not actually being in the same space as the people they interact with for hours each week.

Virtual Worlds, Real Growth

The success of online worlds like Fortnite and Roblox has led to increased interest in the concept of The Metaverse, virtual worlds where people can 'live' for much of their time with activities, identities, and economies creating an immersive experience.

Both games have millions of daily active users. Roblox now hosts companies like Gamefam, which creates games within the platform that people pay for, and is reportedly generating six figures a month in revenues.²⁴

The past year has also seen an acceleration in the adoption of virtual reality, with (comparatively) high sales for new headsets, especially the Oculus Quest, which allows an untethered VR for less than £300,²⁵ and (again comparative) fast take up of new games like I Expect You to Die 2, which is the first VR game to reach more than \$1m in sales in the first week.²⁶ Research from CCS Insight reports that 70% of VR users bought their headsets in the last year, and 90% play games in VR at least once a week.²⁷

1.3

MEGATREND #1

Virtual Worlds

Playing, Exercising & Working Virtually

New use cases are being found for VR, like fitness. There are now a number of apps like FitVR that allow people to take part in immersive workouts that feel real because of the headset.

More people now work remotely, meaning that contact with colleagues is based on video calls and emails. This could also be an opportunity to create something like a virtual world around workplace collaboration.

In August, Facebook, owner of Oculus, revealed its virtual workspace, Horizon Workrooms, and declared that it was transitioning into a metaverse company. In an interview, Mark Zuckerberg spoke about the joys of more immersive experiences, for example, visiting virtual comedy clubs, vs. the experience of watching things like that on video calls. Facebook has more than 10,000 employees working in metaverse-related projects, including VR and AR.²⁸

ALL ROADS LEAD TO THE METAVERSE

To learn more about the metaverse opportunity, understand the role of gaming, and explore how brands can get a head start on their journey to the metaverse, read [All Roads Lead to the Metaverse](#) on [dentsu.com](#).

Crucially, Facebook seems to see its version of the metaverse as identity based. Similar to Apple's Memojis, and Snapchat's Bitmojis, the point is that your avatar looks recognisably like you, so that when you meet your colleagues in the office they can recognise that it's you.

DTA – Direct to Avatar

Probably the biggest indication that we are moving into a time of metaverses is the development of virtual economies, or Direct to Avatar instead of Direct to Consumer. Established brands like Vans²⁹ and Balenciaga³⁰ are the latest to sell clothing within virtual worlds – Roblox and Fortnite, respectively – with Balenciaga selling items like hoodies in game and IRL.

We see huge developments in this area - more brands, more drops, more partnerships, and more physical/virtual crossovers.

Brands are also emerging in games, offering clothing for characters.

Brands like The Fabricant, Tribute Brand and Hanifa do not exist in the physical world but are successful businesses through virtual sales.³¹

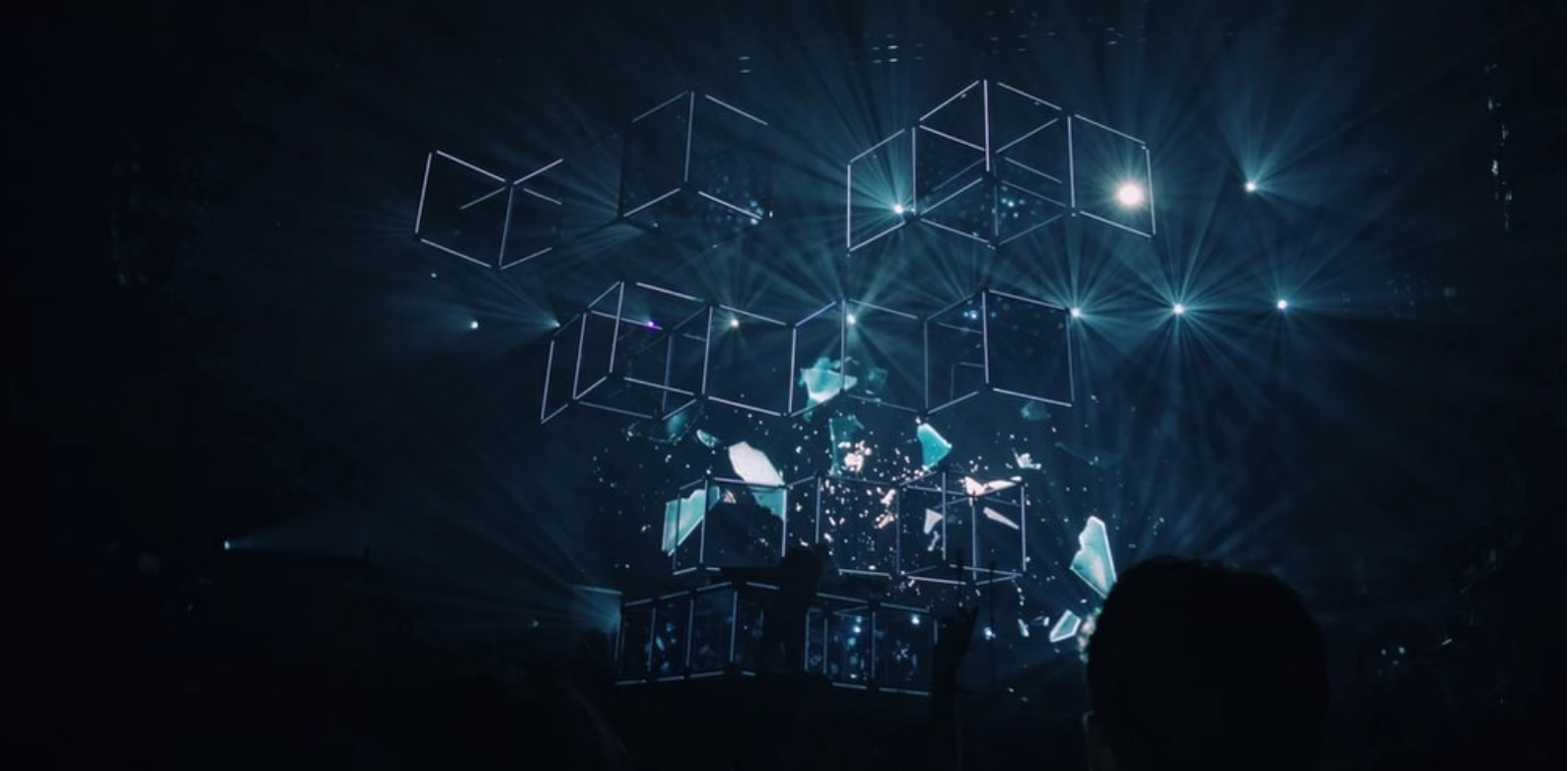
If this is relevant to their audiences, brands should include virtual and in-game elements in existing campaigns; virtual should be part of an omnichannel strategy. Virtual worlds allow brands to do things that would not be possible in the real world, from in-game powers to virtual sub brands.

What Brands Can Do

Incorporate virtual and in-game elements into existing campaigns; virtual should be part of an omnichannel strategy.

Experiment with the idea of avatars as an audience. Explore ways to target based on new, virtual and in-game metrics.

Evaluate any applicable lessons from social media that could also work in virtual worlds.



MEGATREND #1

1.4 Secure Scarcity

Online trading also boomed during the pandemic, and the rise in popularity of cryptocurrencies has had an unexpected knock-on effect: the rise of the secure asset technology, the NFT. One of the issues within the digital economy has always been the ease of copying content and assets. Paywalls and subscriptions have taken off in the past few years, but it is still comparatively easy to copy an article to send to friends or forward a paid for newsletter. You can argue that part of the appeal of live audio apps like Clubhouse is the fact that it is not recorded, and not shareable - be there or miss out.

NFTs - The Second Breakout App for the Blockchain

The real advance in secure scarcity is NFTs. NFTs (non-fungible tokens) are the second big use of blockchain technology to capture the public imagination, after cryptocurrencies. While digital money is fungible - one bitcoin is effectively equal to another, in the same way that one £10 note is effectively equal to another - NFTs are created to be unique.

The growth of interest in NFTs comes after a big rise in the number of people who own some form of cryptocurrency, estimated to be at nearly 60m people in the US, up 61% in two years, according to research by Finder.³² Trading in assets like Bitcoin and Ethereum took off under the pandemic in a similar way to stock market trading, fuelled by individuals with time on their hands, and a new generation of trading apps like Robinhood and Coinbase. This has led to greater interest in NFTs, which generally need to be bought with coins like Ethereum.

1.4

MEGATREND #1

Secure Scarcity

Artists and creators have started to use the technology to mint proofs of ownership for their items, like an original artwork, or a limited run of prints. Adoption of NFTs started off in areas traditionally associated with collecting - artworks and memorabilia like baseball cards - but is now spreading to a much wider range of creators, and even brands.

The two most well-known content collections are CryptoPunks, a limited collection of pixelated portraits, and Bored Ape Yacht Club, a collection of automatically generated cartoons of apes, each with slightly different features (hats, clothing, facial expressions). In May 9, CryptoPunks sold at Christie's for \$16.9m,³³ and in September, a set of 101 Bored Ape Yacht Club NFTs fetched \$24.4m at Sotheby's.³⁴

The numbers are extraordinary. The market has grown from \$13.7m in 2020 to \$2.5bn in the first six months of this year,³⁵ while the value of NFT-related companies is even higher: Sorare, a French company that runs fantasy football games secured by NFTs, is now worth \$4.3bn following an investment from Softbank.³⁶ While a lot of this is likely to be speculation, as is also true of cryptocurrencies, there is clearly something going on!

CPG & NFT

Not surprisingly, brands are also testing the water. Several, including Taco Bell, Coca-Cola, Campbell's, Budweiser, Microsoft, Nike, Marvel, and Warner Bros have produced NFTs, either for existing campaigns, or as one-off activations, for example, raising money for charity.³⁷ In September,

Bacardi released a single NFT around the launch of a new limited-edition rum, with proceeds going to Backing the B.A.R., Bacardi's partnership with the NAACP to help black-owned bars.³⁸

Perhaps the most interesting category is luxury, where brands have passionate fans who want beautiful and rare items. Burberry recently created an exclusive set of characters and accessories for the game Blankos Block Party and sold these as NFTs. Fans could buy items ranging from characters within the game for \$299.99 to arm bands for \$24.99, with a total value of \$395,000. All items sold out; the characters sold out within minutes.³⁹

The secure scarcity that NFTs offer is leading them into new use cases beyond just proof of ownership for artworks. In March, the band Kings of Leon created NFTs associated with their new album. Most were just proofs of unique ownership, but one set of six offered the owners the right to attend any Kings of Leon shows at any time in the future, essentially a golden ticket,⁴⁰ Given that NFTs can be kept in digital wallets on phones, they can be very useful as proofs of payment.

What Brands Can Do

If relevant to your audiences, identify the superfans willing to pay for items or experiences connected to the brand and develop strategies to appeal to them.

Partner with platforms and intellectual property that will appeal to the fans, or already have a strong crossover in audience.

Start small, test, and scale.



1.5

MEGATREND #1

Fans of Flexibility

The pandemic is also having an ongoing impact on working patterns and living arrangements which has resulted in more flexibility for many people. Technology flattens distances, and the shift to freelance work has been accelerated. Freelance platform Fiverr was founded in 2010. It took 10 years for its members to be paid \$1bn, but just 14 months to reach \$2bn.⁴¹

Trusting Colleagues to Work from Home

Lockdowns made many office and creative industries switch to working from home, and indications are that many will not go back to the office full time, or, in some cases, at all. For example, the crypto trading platform Coinbase has given up its office space, letting staff work remotely for the foreseeable future.

Using home broadband, video conferencing and collaboration apps means that many people can be just as productive from home, at least for some of their tasks. Why go to a specific space if you will only be on calls or sending emails all day?

Research from Stanford found that some workers view the option to work from home as a benefit equivalent to a \$10,000 pay rise.⁴² Huge fans of flexibility! Google is one company that is offering its staff continued flexible working options but has warned that if people choose not to go back to the office at all they will not be paid as much as those who do, based on a presumed lower cost of living if they have moved away from a city.

Anecdotes abound of colleagues moving out of cities to get more space, and of new hires expecting to work remotely much of the time. Thailand has just announced a new visa programme giving wealthy foreigners and their families the right to stay and work for ten years, as long as they buy property for at least \$500,000 or invest at the same level, and will be earning at least \$80,000 a year, clearly targeting remote employees looking for relocation options.⁴³

1.5

MEGATREND #1

Fans of Flexibility

Flexibility Brings Advantages

Holidays may also change. While travel has become harder, with tighter border controls and mandatory tests, it is now also potentially possible to go away for longer and spend at least some of the time working from the Airbnb, making WFH mean work from holiday, and then take a shorter period as actual holiday.

Companies will be able to employ people based on their time zones, for example, creating teams that can take over projects at the end of another team's working day. Staff who love the freedom of I can work from anywhere need to be aware that it also means someone from anywhere can do your job. It is also possible that staff who can guarantee to be physically present will start to charge a premium.

We must stress that this is only likely to apply to a small percent of the workforce. The UK's Office of National Statistics (ONS) reports that in the UK 25.9% worked from home for at least part of 2020, more than double the level for 2019, but still a small part of the overall workforce.⁴⁴ However, changes experienced by this cohort could lead to more workers being employed in support industries including cleaning, hospitality, storage and other services that wealthy travellers are likely to use.

What Brands Can Do

Target globally if regional and national boundaries will mean less for some consumers.

Clarify the attributes of existing customers and targets: affluent audiences traditionally seen as urban may have become more rural in the past two years.

Be conscious that not everyone will have this flexibility – this could create new economic and cultural divides.



01

MEGATREND

The Prolonged Pandemic Key Takeaways

We have seen great changes over the past 20 months that will have a lasting impact on how we live, work, shop, and interact with each other. For many, life has become more flexible, and ideas that may have seemed like science fiction not long ago are breaking through to the mainstream.

Brands need to innovate and adapt to the new behaviours, take a flexible first approach, potentially picking up new customers in the process. It should be a time for testing and innovating, both in offering new ways to engage, but also in trying out new technologies and channels.

CO2

MEGATREND #2

Brand Citizenship

**PLANET
EARTH FIRST**



02

MEGATREND

Brand Citizenship

Brands are increasingly showing their human side. The rise of social media has meant that many consumer-facing brands now have a more human tone of voice, used to share news and to reply to consumer queries, and now many are acting in a more human way, showing a more empathetic and caring side.

The twin shocks of COVID-19 and BLM protests in 2020 have helped companies to refocus on what they stand for, and increasingly become involved in causes, including climate and equality.

There are many examples of companies trying to do good and set a good example to their customers, their peers and governments. Facebook's offices and data centres use renewable energy, and reached net zero emissions in 2020.⁴⁵

IKEA has announced plans to start offering clean energy to households in Sweden that pay the membership fee and get certified solar- or wind-generated electricity with usage tracked through a mobile app.⁴⁶

LEGO has developed a way of making its standard bricks using recycled plastic, producing a prototype this year, with a goal to make all core products out of sustainable materials by 2030.⁴⁷

We see two interesting trends -

- **The Responsible Rebuild** - Companies are rebuilding their supply chains and working practices to try to make the world a better place.
- **Sustainable Marketing** - Companies are also taking more care to spend their marketing budgets in a way that will support causes they care about, as well as driving effectiveness.





MEGATREND #2

The Responsible Rebuild

While some brands have always tried to make the world a better place, in the words of a recent FT editorial, “Let’s not go back to a past which wasn’t working anyway” and find new, more sustainable, fairer ways of working.

Brands Can Help Their Customers Live Sustainably

More brands are making public pledges on climate, including brands like Nando’s⁴⁸ and BrewDog⁴⁹ that are becoming carbon neutral or negative, providing an extra selling point to customers who are trying to do their bit to help.

Brands like Levi’s⁵⁰ and Nike⁵¹ are focussing on the circular economy, both making it easier for people to recycle, but also repairing and reselling pre-owned items that they buy back from customers. IKEA made this idea the focus to their Black Friday campaign, and is now offering to take back and resell items from shoppers in more locations.⁵²

Jacqueline Windsor at PwC, quoted by the FT, believes second-hand will increasingly encroach on fast fashion turf. “Teens don’t think in terms of resale versus new. They think about what they can get for the amount they have.”⁵³

Reuse, Resell and Repair

Technology companies are also becoming more sustainable. Samsung has developed a programme to create apps that transform old handsets into other useful household items like baby monitors that still use some of the capabilities of phones that still work but won’t work very well as day-to-day communication devices anymore.

Governments around the world are debating whether to try to introduce ‘right to repair’ legislation, aimed at targeting unfixable products and built-in obsolescence.⁵⁴

Strategic partnerships also help make brands more sustainable. Resale brand thredUp has partnered with other fashion labels like Madewell to manage their resale process and site, buying back old items from customers to catalogue and then remarket them.⁵⁵ Meanwhile adidas has formed a partnership with Allbirds to pool their technologies to innovate with a collaborative sneaker, billed as the most sustainable ever created.⁵⁶

The Responsible Rebuild

FMCG brands are also working on their supply chains. PepsiCo is creating millions of acres of regenerative farmland,⁵⁷ while a coalition of competing brands including Colgate-Palmolive is investing in an incubator to help start-ups finding different ways to use technology to make supply chains more sustainable.⁵⁸ While it is still rare for brands to become B corps, making sustainability one of their key aims, several have now achieved this accreditation, including Ben & Jerry's, Danone North America, and Patagonia.⁵⁹

These brands are acting ahead of government regulation, and you can argue that one reason for this is that their most important audience is a younger, more aware one, rather than elected governments who normally have to follow what the majority want.

Green companies all demonstrate that there are sound business reasons for taking sustainability seriously and acting as good global citizens. It is easier for brands with younger and more liberal consumers to do so, but where they lead others will follow.

What Brands Can Do

Understand where your consumers stand on issues and work out how you can align with them, or set an example.

Clearly articulate messages to explain the benefits of what you are doing, and recruit relevant influencers to help explain actions.

Develop packaging as media, offering tools and experiences to explain and demonstrate changes in supply chains or traceability.



Sustainable Marketing

According to the 2021 Advertiser Perceptions' Trust in Advertising Report, the percentage of advertisers that apply corporate responsibility and brand values to media spending decisions has increased more than 20% from a year ago to 82%.⁶⁰ Brands and agencies are trying to spend their advertising budgets to make marketing more sustainable, and promote fairness. Driven by the need to make the world better, large advertisers are starting to make principled choices.

Building Sustainability into KPIs

For example, Unilever has introduced a new marketing philosophy based on three principles: Get Real, which focuses on data and empathy to solve real-world problems; Do Good, which continues the need for each of its stable of brands to serve a purpose that drives positive change; and Be Unmissable that spurs them each on to be culturally relevant.⁶¹ GSK's Brands with Humanity positioning aims to close the gap between selling products and solving consumer problems.⁶²

Principles like these are changing how brands act. Coca-Cola has a quota in the United States to spend a set percentage of budgets with minority owned channels.⁶³ PepsiCo is working with black-owned restaurants to help them grow - and presumably to sell more of their drinks in the process.⁶⁴

Advertising in a More Sustainable Way

There are also ad formats that encourage good works. Good-Loop works with brands like Levi's, and their digital units let exposed viewers decide which causes should get a donation at the end of the ad, meaning that they choose to watch the full ad, but also engage by voting at the end, with a proportion of the ad budget going to charity.⁶⁵

Sustainable Marketing

A recent Coca-Cola campaign to promote a new 100% recycled plastic bottle asked shoppers to pledge to recycle in exchange for a free ten-minute ride on a Lime electric scooter, a good way of getting the message across.⁶⁶

Agencies are working hard to make media more sustainable. In 2019 dentsu launched DIMPACT, a collaboration with Bristol University and some of the world's most innovative media companies including Sky, the BBC and Netflix. DIMPACT is a web-based tool that calculates greenhouse gas (GHG) emissions associated with serving digital media content. This helps dentsu collectively map emissions sources and data from the point of content production up to and including the end user device. Many other marketing groups including IPG⁶⁷ and WPP⁶⁸ are pledging to be carbon neutral by 2030.

THE RISE OF SUSTAINABLE MEDIA

Dentsu and Microsoft Advertising conducted global research to help business leaders understand where consumers stand on key climate issues and what steps should be taken to move forward. Download the key findings on sustainablemedia.dentsu.com.

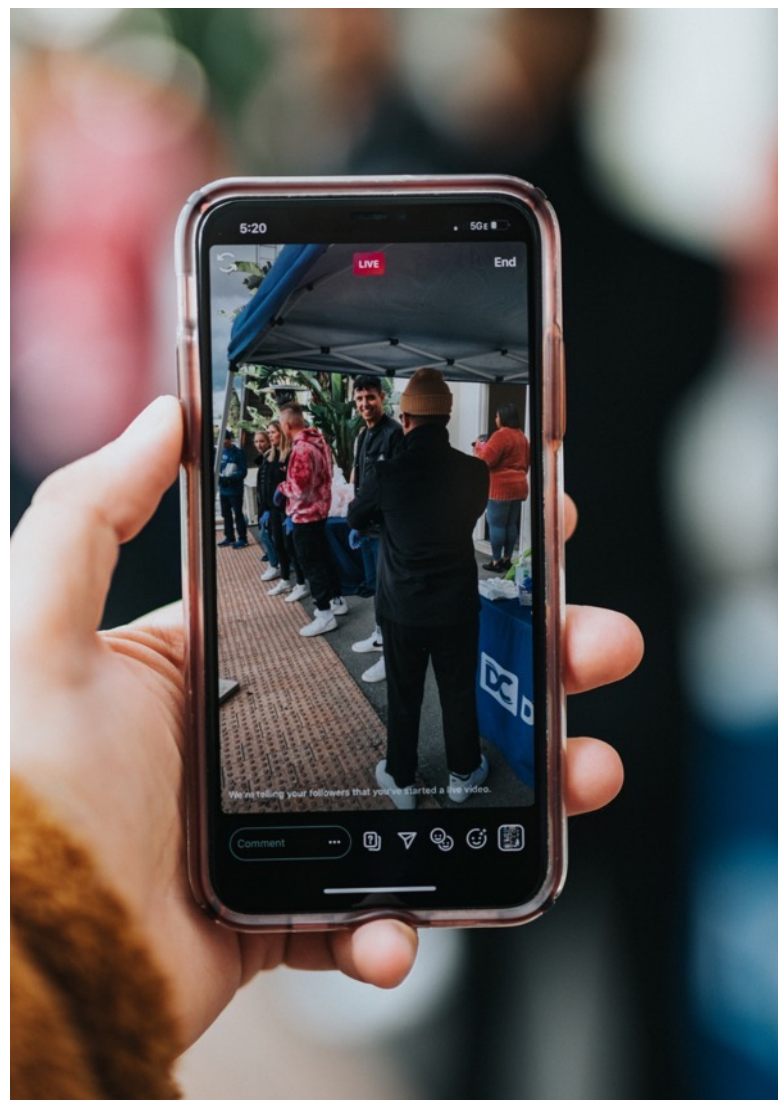
It is also possible to reduce the impact of creative production, traditionally seen as quite a wasteful industry. Green the Bid⁶⁹ is a consultancy that helps creating companies reduce the impact of their work, including ensuring that any unused food on set is donated to local food banks, and that, where possible, props and sets are repurposed with the local community.

What Brands Can Do

Focus on communication objectives first, but ensure that budgets also support sustainable values through messaging and supporting channels that also want to create a sustainable world that is fair and open.

Move budgets into more sustainable channels, using market power to help new technologies and BAME-owned media to grow.

Test new techniques and channels to ensure that more sustainable marketing does not mean less effective marketing.



02

MEGATREND

Brand Citizenship Key Takeaways

In some ways these ideas are not new. There have always been high profile examples of brand philanthropy, and using their economic power and infrastructure for good, but this time it feels different. The new pledges, the new focus on a circular economy and the idea of using marketing budgets to support minority-owned media channels are happening more than ever before and hopefully will soon become the norm.

Brands need to be conscious of their consumers' views and help them live more sustainable lives. For this to be fully sustainable for brands, these actions also need to make business sense, and deliver profits while achieving social impact.

PLANET
EARTH FIRST





03

MEGATREND #3

Identity

03

MEGATREND

Identity

It has never been easier to prove your own identity. Many of us can do it via apps on our phones, particularly since the vaccine rollout, as airlines, venues and even offices are starting to insist on seeing vaccine documentation. At the same time, it is getting much harder for marketers to know who they are advertising to, with greater restrictions being placed by governments and technology companies.

For the past 25 years passwords have been the default proof of identity online, but there are signs that they may soon be replaced by more biometric means like fingerprints on phones, and even selfies analysed by AI and moderators, tools currently being used by companies including Stripe and Tinder.

Passwords themselves are problematic because they can easily be shared. Netflix is estimated to lose as much as €250m a year in the Nordics alone due to password sharing⁷⁰ (assuming everyone took out a subscription instead of borrowing one), and is reportedly testing ways to authenticate users more rigorously.

We see three interesting trends around identity -

- **The end of anonymity** - increasing pressure to be authenticated, signed in and paying digitally is bringing an end of anonymity in life.
- **Beyond the cookie** - New technologies are emerging to replace advertisers' reliance on cookie-based technology.
- **Value exchanges** - The need to gather first-party data and customer data permissions is leading to more content and tools being hosted on brand sites.



3.1 The End of Anonymity

Greater need for identity and authentication means that it is becoming harder to be anonymous. The growing reach of tech giants' walled gardens means that there are limited things that you can do online without signing in, and in many cases signing in includes associating a means of payment with your account.

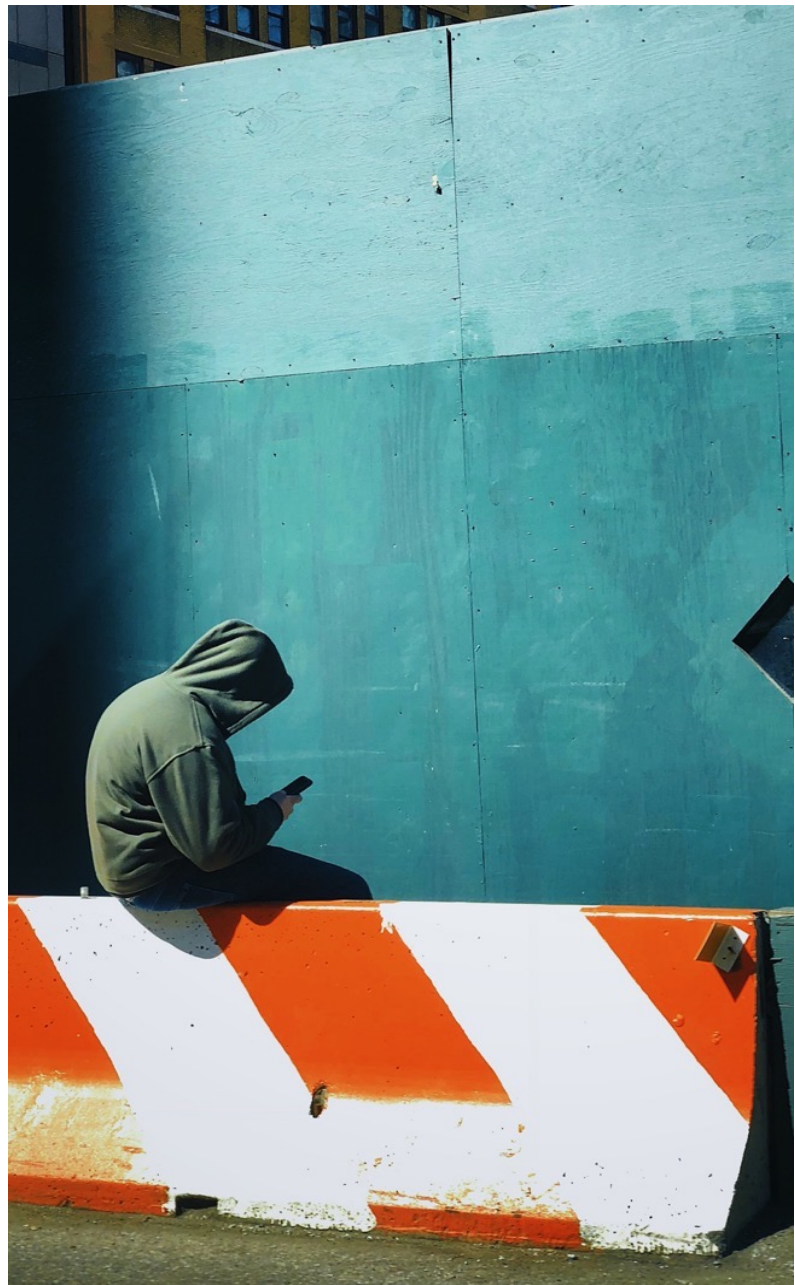
A Greater Need to be Signed In

Within social media Facebook has always pushed for real names, and other services like Apple's Memojis and Snapchat's Bitmojis encourage people to make their avatars recognisable likenesses of themselves. It is noticeable that when bad behaviour happens online, for example trolling, it is much more likely to be on the more anonymous channels.

This year has seen a rapid expansion of Amazon's just walk out shopping technology,⁷¹ where customers have to scan a QR code on their phone and identify themselves before even entering the store. Other retailers are also starting to introduce similar technologies. Even the move to digital payment is a sort of loss of anonymity; your bank statements will show where you have been shopping.

Online dating is becoming less anonymous. To combat catfishing and fake accounts, Tinder introduced tools to let members prove their photos were genuine, and has just started to bring in a voluntary blue tick programme that will authenticate users.⁷² People still won't know exactly who it is they have been matched to, but crucially someone within Tinder does, and this adds extra reassurance.

We have also seen the secure scarcity of NFTs enhancing identities both in virtual worlds and in the real one. NFTs are typically held in mobile phone wallets, and so they travel with the owner wherever they go. Just as a vaccine passport can be a proof that gets you into a gig or event, an NFT can prove that the owner has paid for digital or real-world access, and is a verified user.



3.1 The End of Anonymity

Convenience & Security

Giving up anonymity has two key advantages for consumers: it provides reassurance of safety, and it makes transactions faster. In many cases these advantages are important enough in the value exchange that users will be happy, and if they are not, they can switch to different services.

The advantages are much greater for the platforms themselves. They can be sure who their customers are, and potentially get great insights from mining data in aggregate. They can improve and personalise the service, offering recommendations and more. They can also be sure that customers are the same across multiple devices, and while there are ways for customers to circumvent this, for example, by password sharing, companies can usually spot this if they really want to. Netflix is said to potentially lose millions from customers letting friends and relations log in using their credentials, and is testing how to limit their losses or reverse this trend.⁷³

The end of anonymity is a trend that favours big, established brands. Customers are more likely to agree to sign in if they know and trust the brand; Amazon has managed to persuade people to check into their stores where a less well-known brand would struggle.

The bigger the network, the more likely people are to check in, as there is more potential benefit to signing into a large network than a single small site.

However, there is also likely to be pushback against having to sign in for everything. Just as Snapchat broke through by offering disappearing messages at a time when other online services were trying to encourage users to create a permanent online record of their life, other services will capitalise on the joy of anonymity and not leave a digital trail.

What Brands Should Do

Stress trust and verify messaging, particularly on platforms where people sign in for peace of mind.

Build partnerships with other trusted brands



Beyond the Cookie

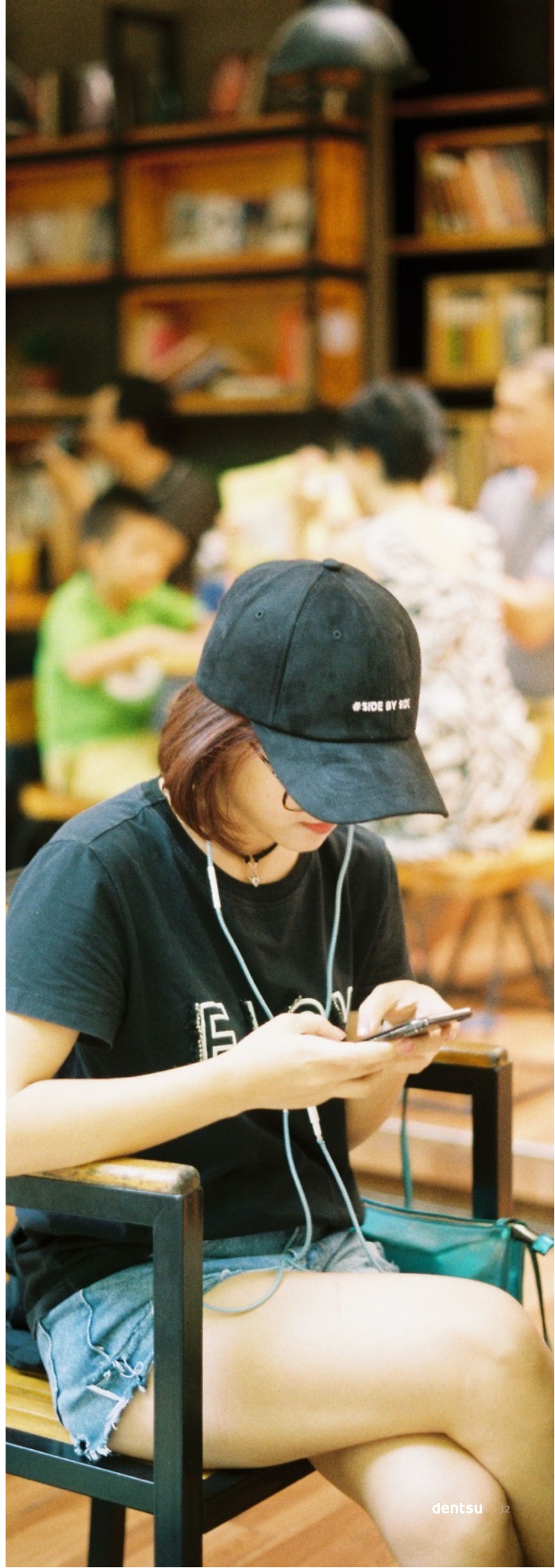
2020 has seen even greater measures to protect individuals' data particularly in the context of online advertising. In early 2021 Apple released a whitepaper *A Day In the Life of Your Data*, which followed the experience of a father taking his daughter to the park, highlighting all of the data that they unwittingly share simply by doing a few searches, and using a few apps. Apple's point is that people should be more aware of what data the apps on their phone are collecting, and how people should have more control of what they share.

Challenges from Three Sides

When it comes to data used for advertising targeting, the argument put forward is that while it might be reasonable and beneficial to allow a company that knows you, or sells to you, to collect and hold some data, this is not the case for unknown, third-party ad tech companies who will then use that data for unspecified purposes.

At the same time many of the world's leading economies including the US, EU, China, Japan, India and Brazil have either implemented or drafted privacy regulations to protect consumer privacy.

Consumers are looking for ways to keep their data more private. Research from Microsoft Advertising and iProspect shows that across the globe, 91% of consumers are concerned about the amount of data companies can collect about them.⁷⁵



Beyond the Cookie

In summer 2021, Apple introduced their iOS 14.5 operating system which required users to grant permission for apps to track them and pass their data back for purposes like advertising. Early data collected by Flurry indicated that, ironically, only about 14.5% of users were giving apps this permission.⁷⁶ Google has announced that its Chrome browser, which has an estimated market share of almost 70%,⁷⁷ will stop accepting third-party cookies in 2023⁷⁸ and replace it with still unspecified tools to facilitate ad targeting and tracking.

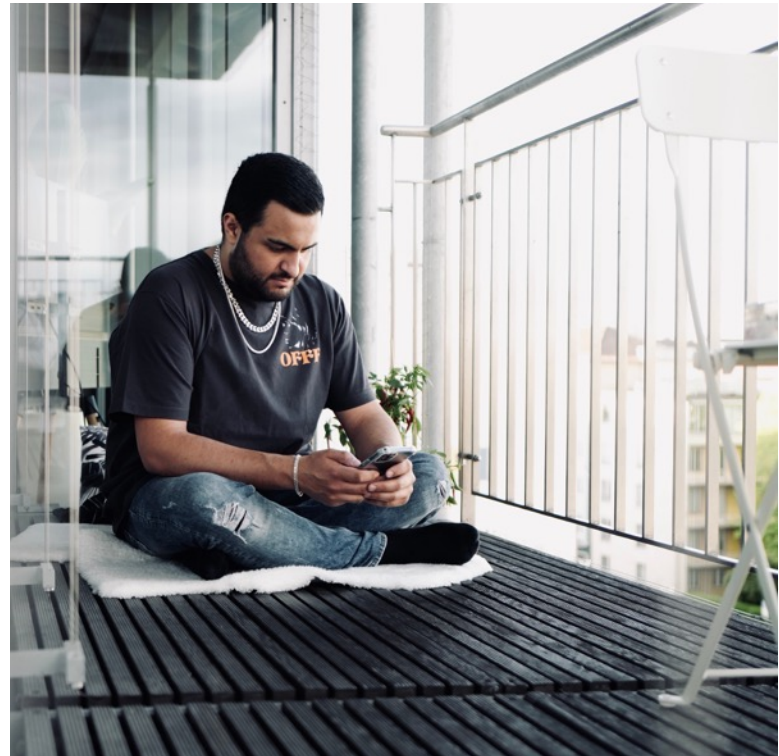
This means that marketers need to find new ways to target their potential customers. The deprecation of cookies and tracking means there will be fewer opportunities for ad personalisation, inability to set the number of times an ad is seen across different platforms, and loss of tracking data, including view-through conversion data.

Context Gets Clever

One of the brightest opportunities is contextual targeting. Traditionally, contextual was very straightforward - car ads on car pages - but new ways of using AI to interrogate large data sets boost the potential for this to be much more sophisticated and accurate.

One way to try to group audiences together, based on anonymous, aggregate data is to sort by audience interests. Facebook, Twitter and others are now actively asking users to select topics they are interested in to help contextual targeting, and image recognition tools can also look at the sort of content people are interested in based on what pictures and videos they find engaging, again to try to build up tribes of interests.

Other companies can take an existing audience-based campaign and reverse engineer it to work out how it could have been targeted contextually.



THE COOKIELESS WORLD

To focus on what you should know today and investigate tomorrow to be ready in 2023, when the world will become cookieless, download the report *The Cookieless World - A Guide for the New Era of Digital Marketing* on dentsu.com.

Beyond the Cookie

There is also work being done on defining what context is, including weather, devices, and so on, and even looking to see price information. If petrol prices are rising in one area it could indicate that adverts for electric vehicles will work better. This sort of context can feed both into the targeting of messages and which creative is shown at what times.

The move to context also helps explain the growth of influencer marketing. Most influencers are influential just in certain realms, and their focus - food, travel, fashion - defines who their audience is likely to be.

What Brands Should Do

Use these changes as a unique opportunity to rebuild trust between brands and consumers around data.

Invest in first party data, as this is the key to future ID-based solutions and increasing lifetime value of your customers.

Use contextual targeting to address users' motivations and relevance, and as a way to drive new traffic to your own domains.

Use more unblockable channels like dynamic out of home, and be smart about anticipating where cohorts of people will be, and what they will be doing.



Value Exchanges

The increasing threats to third-party tracking have led to advertisers needing to collect first-party data, and this, in turn, has led to the idea of more explicit value exchanges where brands ask users to give permissions and submit email addresses in order to get access to entertaining or useful content hosted on brands' own sites.

This is a marked shift from a few years ago where content and competitions were generally hosted on social channels. What we now see is the creation of many campaign-specific sites for brands, specifically to host experiences or some other form of data capture so that the customers or prospects can be later targeted with ads.

One example comes from PepsiCo's Lay's snacks brand. They used DeepFake technology to create a tool for fans to create a message from footballer Lionel Messi in multiple languages. Hosted on MessiMessages.com, the site asked users to select different options including their own and a friend's name, and then a few alternatives to produce a video message to send to a friend or embed in social media.⁷⁹

Another example comes from Bud Light, whose Summer Stimmy campaign in the US wanted to help people socialise again by offering stimulus rewards like free first drinks in the bar, and free festival tickets for site visitors who had submitted an email address and granted permissions.⁸⁰

While to marketers some of these campaign metrics may seem pretty transparent, done properly they can feel like personalised velvet rope experiences for customers and prospects.



Value Exchanges

A more explicit value exchange is part of a journey that the whole media industry has been on, largely due to ad blocking and other ways of avoiding ad exposure. The value exchange used to be well known, but vague: watch these ads because they pay for content and services. Now that it is easier to get content without seeing ads, services like Spotify have made it more overt by offering an ad-free version for a monthly subscription, or even charging extra for extra features, as Twitter has done.

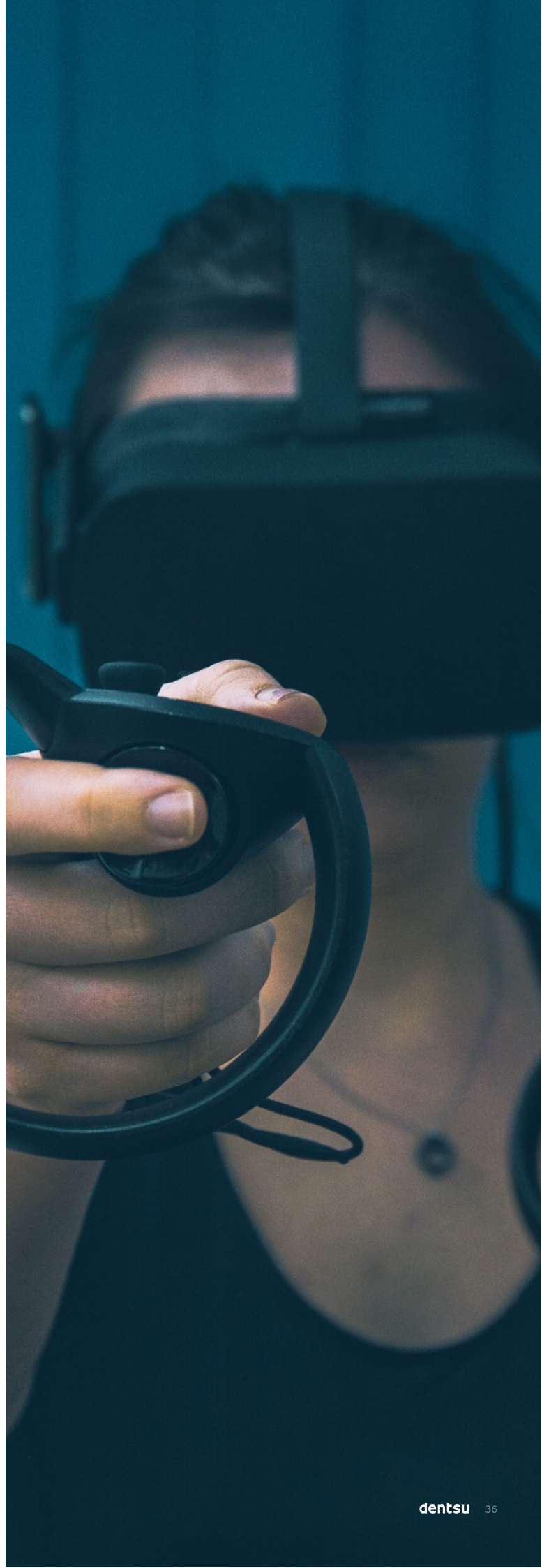
While this shift to a more overt value exchange is potentially a good way for brands to get access to customer data and permissions, the danger is that we will start to see content clutter or inflation in sweepstake prizes - the possibility that almost every beer, snack company or car will be offering incentives to visit their own sites.

What Brands Should Do

Create compelling tools and content, and support them with relevant channels including paid media, social posts, and PR.

Build in repeat use and loyalty elements to ensure that permissions given don't expire.

Innovate with ideas, test for resonance.



03

MEGATREND

Identity

Key Takeaways

The issue of identity is perhaps the most important for marketers. It seems certain that people's online identities will become even more important to them, while being ever harder for brands to access.

As with many of the ideas we have featured, this shows the increasing importance of trust. Brands need to be trusted for people to agree to sign into their sites (or stores) or submit email addresses to give them permissions to target.

Brands can build trust by acting in more ethical, fair and sustainable ways, essentially by demonstrating transparency and empathy.

Trusted brands will benefit by seeing customers willing to engage across multiple channels, try out new ways to buy, play with them in virtual worlds, buy virtual goods, and respect their flexible approaches.

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www.dentsu.com

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