



CONTAGIOUS

THE CONTAGIOUS IQ DOWNLOAD

Breakthrough ideas of 2025



Welcome to our annual gift to the industry of a selection of the standout campaigns, brands, trends and interviews we featured on Contagious IQ this year.

We've saved you the effort of dumping this PDF into your favourite LLM by summarising the key learnings from a whole range of IQ content. (But if you're resisting the urge to join the post-literate society, we've snuck in a couple of longer reads too.)

Out of the thousands of campaigns we looked at, and the hundreds we actually chose to write about, you'll find some of our personal favourites on [page 3](#) – all hand-picked for demonstrating exceptional creativity, strategy or their ability to nail the cultural zeitgeist.

On [page 14](#), you can get the top-line info from five of our in-depth brand spotlights. From a pre-biotic soda brand and a kidulting darling, to an indie film studio and a Latin American ecommerce retailer, it's a good place to get up to speed on some of the most interesting and innovative companies.

If snappy advice is your thing, we've assembled a CMO's Survival Guide ([page 24](#)) based on the condensed wit and wisdom from some of the world's leading marketers. You'll also find plenty of advice on [page 31](#), with our guide on how to build a brand for Gen Z – a demographic that feels increasingly divided and shortchanged.

And, ending things on a cheery note ([page 37](#)), we've included an excerpt from our interview with author and activist Cory Doctorow on advertising's role in the process of enshittification. Enjoy!

Alex Jenkins / Editorial Director / Contagious

2025's best campaigns

The definitive Most Contagious list. Fifteen campaigns from across IQ that stood out for ambition, originality and sharp thinking. The work that pushed categories forward and earned its place at the top of the year

▼ ROOMIES

Bilt / In-house

Flatmates, rent and passive-aggressive group chat texts form the holy trinity of adulthood. Roomies by Bilt, the rent rewards programme, captured it all with a 13-episode mockumentary so painfully real you can almost hear the argument about whose turn it is to buy toilet paper. The brand barely appears beyond the bio; each two-minute episode leans into relatable chaos people actually want to watch. No hard sell, only humour and human truth. With 8.3 million Instagram views and 7.4 million on TikTok, Roomies proved the appetite for properly made, episodic shortform. If you need an example of how to do it right, this is it.



▲ MANOR HOUSE

Nike, Palace / JAM, Assemble

Cities are losing the places that make them feel alive. Pubs keep disappearing, informal hangouts are being redeveloped and the cultures that rely on shared space are left with nowhere to go. Nike and Palace stepped into that gap with Manor Place, a restored 19th-century bathhouse in South London. Open six days a week and free to enter, it gives skaters, footballers and creatives room to hang out – and buy exclusive Nike x Palace drops. Manor Place shows that if a brand wants community credibility, it has to build something people can actually use.

MOST CONTAGIOUS CAMPAIGNS

► PUB SUCCESSION

Heineken / Le Pub, Publicis Dublin

When a 155-year-old Irish pub was about to lose its family name, Heineken launched a global search for someone to run the bar on Ireland's scenic Achill Island. All it asked for was pub experience, a love of Irish pub culture – and the same surname: McLoughlin. Billboards went up in cities with large Irish populations, from New York to Sydney to Buenos Aires. This was no gimmick: the initiative offered real, practical support to the new owner, ensuring the pub's long-term survival. Pub Succession celebrated a cherished local institution, built brand love in a highly evocative market, and demonstrated that staying true to brand values doesn't mean repeating the same ideas.



▲ OBSOLETE COMPUTER

Back Market / In-house

Windows 10 is retiring. Millions of laptops are about to turn into paperweights – or so Microsoft says. Back Market saw an opportunity in the apocalypse. The tech refurbisher turned 'death to Windows 10' into an option, selling refurbished laptops preloaded with ChromeOS Flex for £99 so older machines could run like new. It even offered free tutorials so people could do it themselves. By hijacking a Big Tech moment, Back Market turned a forced upgrade into a rebellion – and positioned itself as the underdog keeping good tech alive. Expose the system, solve the problem, steal the win. Textbook.



◀ BACK RACK HACK

Harbin Beer / BBDO China, Shanghai

The most experienced beer drinkers know the truth: the cold ones hide at the back of the fridge. The problem is nobody can see them. Harbin Beer made that tension its strategy. In China's mom-and-pop stores, where 62% of sales happen, it asked retailers to move its bottles to the back, where they are about 6.5°C colder. Then it solved the visibility issue with spring-loaded racks that pushed bottles forward and a cheeky line on the fridge: 'It's Cooler at the Back'. The counterintuitive flex worked. Instead of paying for front-row space, Harbin claimed the coldest spot in the fridge – the one drinkers actually want. The result: an 18.7% sales lift.

MOST CONTAGIOUS CAMPAIGNS

▼ NEVER BECOME A FORMER NEW YORKER

StreetEasy / Mother New York

London might have been calling for The Clash, but StreetEasy argues New York calls louder. In February 2025, the platform urged first-time buyers to rethink leaving the city, using dry, funny ads to show what people give up: New York-style pizza in a strip mall, quiet nights that feel more dead than peaceful, and life without a bodega when you need one. A hotline, 1-833-I-MISS-NYC, let ex-residents confess what they missed – proving that if you leave New York, the city will still find you.



► SLEEP TALK REVIEWS

Ikea / Rethink, Toronto

Would hearing 'Wheresh de bungee?' convince you to buy a mattress? Apparently yes – if it comes from someone asleep, not yelling down the street. Ikea Canada condensed 90 hours of sleep babble into a 60-second hero film, showing participants testing Åkrehamn and Vagstranda beds while cameras recorded their midnight musings as proof of comfort. In a world full of AI reviews and influencer noise, the brand found credibility where it can't be faked: the unconscious mind. By leaning into deep-sleep nonsense, Ikea showed you don't need tech gimmicks to rest well, only a solid mattress – reinforcing its sleep credentials and making a sharp play for a generalist brand in a category full of specialists.



◀ THREE WORDS

AXA / Publicis Conseil, Paris

Most home insurance covers fires and floods. AXA added something harder to spot: domestic violence. In France it rewrote its contracts to include 'and domestic violence', giving victims the right to relocate, access legal aid and receive psychological support. No tech, no fanfare, a small change with real weight. In a category hooked on price wars and policy jargon, AXA treated protection as a duty, not a tagline. Backed by 500 trained employees, 80 NGOs and 2.5 million updated contracts, the move turned fine print into action and forced rivals to rethink what protection should mean. The impact was immediate: 121 people supported in the first month, web visits up 321% and consideration rising from 43% to 67%. Three words, enormous impact, and proof that progress sometimes starts with a pen.



MOST CONTAGIOUS CAMPAIGNS

▼ IT'S ONLY NATURAL

Burger King / INGO, Hamburg

If unconscious muttering can sell mattresses, then wide-eyed babies can sell burgers. Burger King captured babies' unrehearsed awe as they watched their parents devour Whoppers, underscoring how its burgers are free from artificial flavours, colours and preservatives. Shot on smartphones and stitched together like family clips, it felt intimate, believable and human in a way most ads only pretend to be. Critics wagged fingers at 'health washing', but the cheeky disclaimer – 'it's the child's reaction, not a health claim' – winked at sceptics while keeping the idea playful. Moldy Whopper made you recoil; It's Only Natural makes you grin.



▲ THE PERIODIC FABLE

The Ordinary / Uncommon Creative Studio, London

At Contagious we've got a soft spot for brands that call bullshit, and few do it better than The Ordinary. Superfood this, wrinkle-erasing that. Skincare loves a buzzword and most of us have fallen for them. The Ordinary, built on radical transparency and a no-frills approach, wasn't having it. To call time on empty claims it launched The Periodic Fable, swapping the elements of the periodic table for 49 meaningless skincare buzzwords and turning pseudo-science into satire. It paired this with a dystopian short film showing people performing viral skincare rituals like hypnotised lab rats. And it didn't sell a product. What it offered was clarity, honesty and a wink to consumers tired of the puffed up claims of the beauty industry.

MOST CONTAGIOUS CAMPAIGNS

► CALL OF DISCOUNTS

Mercado Libre / Gut São Paulo

Ecommerce giant Mercado Libre tasked footballer Neymar Jr to play hide-and-seek on Twitch for Call of Discounts. Playing Prop Hunt in Call of Duty, he disguised himself as everyday products across multiple maps while viewers watched discounts change in real time: the longer Neymar survived, the smaller the discount; once found, the deal unlocked instantly. The stunt pulled 180,000 live viewers in Brazil, peaking at 23,000 at once, and drove 16,000 coupon redemptions within 45 minutes. Mercado Libre credits the stream with more than \$1.3m in extra sales, reaching over 50 million people and generating 350 million impressions. Nothing says commerce innovation like a millionaire pretending to be a wheelbarrow.



◀ ONE CHIP FOR EVERY KIWI

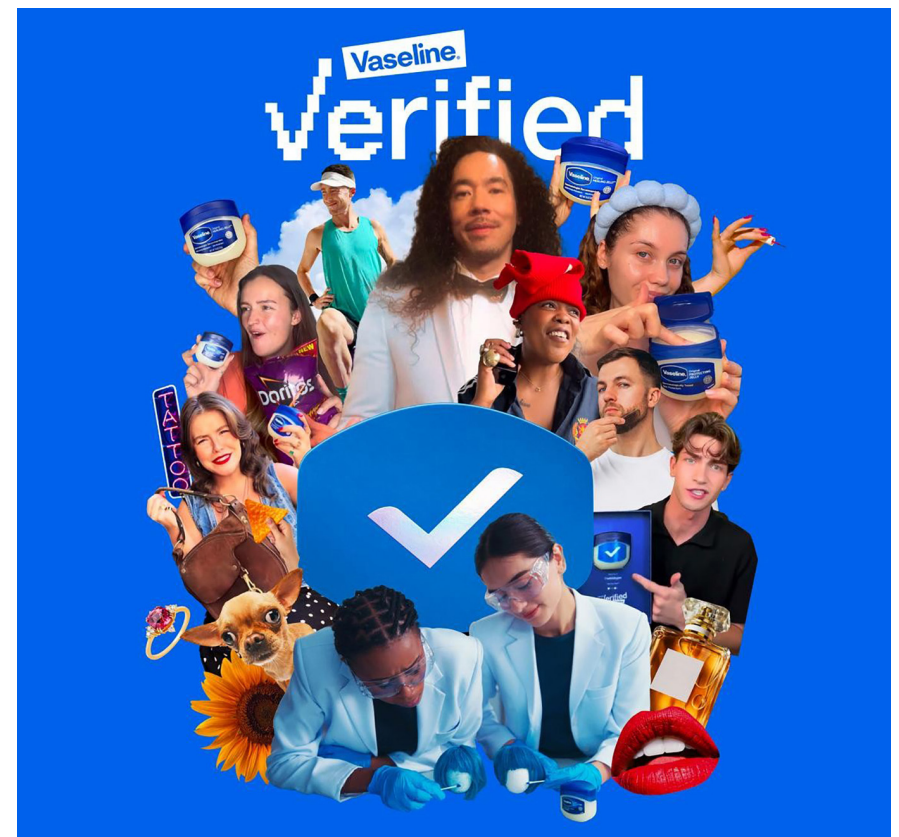
Snackchangi / Pitchblack Partners, Auckland

This sampling campaign was equal parts ambitious and absurd: snack brand Snackchangi set out to hand deliver one crisp to every New Zealander. That's 5.5 million crisps, each in a tiny bespoke pack with a real person's name. Predictably, it went hilariously wrong – and that was the point. Brand founder comedian Leigh Hart turned the chaos into a national challenge, offering cash for the most creative hand-offs. By anchoring everything to one simple stunt, the audience became the story and a massive gesture suddenly felt personal.

▼ VASELINE VERIFIED

Vaseline / Ogilvy Singapore

Vaseline has been part of daily life for decades, and this year it proved you don't need reinvention to feel fresh. People were already posting hacks for everything from softening selfies to surviving fiery curries, so the brand leaned in. Vaseline Verified was a social-first idea: take the most viral fan hacks, test them properly, and publish the results as proof. Lab checks, clear claims and creators showing the hacks in action. No rebrand, no new product; the campaign amplified what people were already doing and gave it credibility. Sales rose 43%, but the cultural shift mattered more. Vaseline turned familiarity into an asset, showing that relevance can outrun reinvention. Sometimes the smartest move is backing the story people already tell about you.



▼ NEW JEANS

Olga Basha / Epoch Films

Luxury fashion still defaults to polished perfection. Olga Basha broke the script. Its New Jeans film – promoted on social – follows two friends in a Manhattan cafe watching a familiar love interest across the street behave appallingly, from nose-picking to eating food picked up off the pavement. Amusingly, they seem more interested in his jeans than his hygiene. A quick text asks where they're from. He replies: 'Olga Basha.'

Directed by Matias & Mathias, the film continues the brand's habit of leaning into dry, precise humour instead of glossy posturing. The pacing is slow, the framing is simple and the absurdity is allowed to breathe. It looks premium without acting precious. The jeans stay central, but the joke does the work.

The payoff is clear. The film sticks because it behaves nothing like traditional luxury advertising. It's memorable, highly shareable and lifts the brand name into the punchline itself. New Jeans proved that for emerging fashion labels, personality is a real differentiator – and in luxury, it often cuts through faster than perfection.



▲ FAMILY ROAST

Medibank / Colenso BBDO, Auckland

Mental health is one of the hardest things for families to talk about. People know they're struggling, but the setting never feels right. Australian health insurer Medibank tackled that with Family Roast, a simple card game designed with mental health experts to make honest conversations feel natural. Launched with Australian comedian Magda Szubanski, it landed in homes across Australia through 14.8 million printed decks. The idea is deliberately low-pressure. The questions are playful, the tone is warm and the format feels like a night in rather than a lecture. And that's the point. Family Roast gave people a tool they could actually use. It showed Medibank wasn't pushing awareness; it was investing in something that helps people talk.

Insight & Strategy: EA / Drop In

How a skating game hyped up its comeback by paying tribute to skate culture

Game developer and publisher EA has revived Skate, its cult skateboarding franchise that first launched in 2007. The series became known for its physics-driven control system, its focus on creativity over competition and a community that kept the game alive long after the last release in 2010. Rather than a traditional sequel, the new

Skate is a soft reboot built as a free to play, always online platform that treats the city of San Vansterdam as a social space where players can skate, create and hang out with others.

To reintroduce the franchise after a 15-year gap, EA partnered with Uncommon Studio New York on Drop In, a campaign designed to show how the new game stays rooted in real skate culture. The three-minute hero film uses

Mexico City as a stand-in for San Vansterdam and features more than 100 local skaters and pro talent, with even the cinematographer drawn from the skate community. The film's mix of real world shooting and game-like styling reinforces the idea that Skate blurs the line between play and culture. The wider campaign includes social work, creator collaborations made on set and partnerships

with leading skate media including *Thrasher* and *Free Skate Magazine*.

To understand how the relaunch balanced authenticity, legacy expectations and a modern free-to-play model, we spoke with EA senior director of global brand management Deepa Sen and Skate creative director Mark Renken, and with Uncommon strategy director Albert Opraseuth and creative Sammy Gold.

LANDSCAPE & BRAND CONTEXT

What is EA's positioning in the gaming market?

Deepa Sen: We have an incredible position because of the strength of our IPs. EA obviously has a number of them that have been around for decades, which is a rare thing in gaming.

The last Skate came out 15 years ago, and there's still such a strong community around it, which is emblematic of how EA treats [its titles]. We care a lot about our portfolio and the passionate communities that surround each of them. We don't see these as purely gameplay environments: they're communities with fandoms built around them.

EA is best known for titles like football title Fifa. Where does Skate sit in the brand's universe and in today's gaming landscape?

Sen: Our company strategy is about creating play, watch, create and connect behaviours. Skate has always nurtured all four of those. It's been a title in which there has been a lot of user-generated content – millions upon millions of views from videos of players just putting up incredible goofy, funny tricks. That's a unique platform, and even though the last one came out quite a while ago, the behaviours around it are incredibly modern.

Mark Renken: We have a clearly defined space with all the sports IPs we own. In terms of the role Skate plays within the portfolio, we leaned into the idea of a hangout – this experience where you can just get together with friends and take a breather. It doesn't need to be overly competitive, you don't have to go full lean forward – it's something you can relax with, similar to skateboarding itself.

Between the Tony Hawk remasters and EA's new Skate, it feels like skateboarding games are back in the culture. Why do you think the timing's right, and why now for the reboot?

Sen: It comes from the insight that players want a place to hang out – something this generation especially needs, as the Uncommon team highlighted. It's different from what multiplayer games have evolved into. You've got these high adrenaline games like first-person shooter and battle royale. We're not that. We're more chill and casual, we're a space people can do whatever they want in. The timing feels right from the point of view of the competitive landscape and what the generation is looking for.

Albert Opraseuth: The client gave us a very clear brief. There's an audience that values freedom, creativity, connectivity, community. That's what skateboarding has always been: a place for misfits, for outcasts, for you to find your people. And this audience needs these places now more than ever. They're facing a cultural friction because the world is giving them the opposite of community and connection. That friction is what we based all the work off of.

We live in a polycrisis – a period of constant disruption, rigid systems that demand you conform. Essentially, algorithms are actually punishing you for being creative. This means we see spaces that look the same, stories and music that sound the same, aesthetics caught in an endless loop. That is starting to get inherently oppressive.

In this context, your only choice is to pioneer a new space. This is why we need games like Skate, and why it needed to be fresh. When we started this project, we looked at the



The cast consisted almost entirely of skaters

entire category of skating games and saw it was really rooted in nostalgia, especially with Tony Hawk. They're remakes with a couple of new characters. Even the ad they put out was very millennial nostalgia, whereas we wanted to stay close to the culture.

Renken: We talked a lot about skate culture while preparing for this. It's often reduced to a narrow idea or specific aesthetic, but once you start defining it too rigidly in this space, you miss out on a lot because that culture thrives in the undefined. That's really what the team is getting at: it's an open-source platform for us.

Think about how most people see a staircase versus how a skater does. It's not about rebellion, it's about reinvention and pushing boundaries and structures. The line I keep coming back to is that skate culture isn't a defined lifestyle, it's just something you live.

'We live in a polycrisis – a period of constant disruption, rigid systems that demand you conform. Essentially, algorithms are actually punishing you for being creative'

Albert Opraseuth, Uncommon

STRATEGY

Who was your target for this campaign. Did you want to speak to old fans, or was this about bringing new, younger gamers into the fold?

Opraseuth: When we started out, it was about social play and engaging the community. I was thinking Gen Z and Gen Alpha. Then, as we got into it, we realised there's a million people still playing the old game from 15 years ago, and our legacy players really matter as well. We can't forget them or leave them behind.

Our approach as we learnt more was trying to strike a balance between being new and fresh and making sure that the legacy players don't feel like they've been left

behind or that it's not their game.

Renken: This is one of the toughest briefs I've ever worked on, because the swathe of space between who we're speaking to was enormous. There isn't that clean focus on men 18 to 34 that the first-person shooter game focuses on.

We had to nail skateboarding, because if you don't capture the precision and authenticity of the real thing, you lose that legacy audience from the start. We also had to figure out how to evolve in a free-to-play, always-online space that Skate had never lived in before. Our job, at its simplest, was to open the aperture of skateboarding. We knew older players would at least try it if we got skateboarding right. A million new players jumped into [the original] Skate 3 preparing for the new game to come out.



'We had to nail skateboarding, because if you don't capture the precision and authenticity of the real thing, you lose that legacy audience from the start'

Mark Renken, EA

How did you make Skate feel authentic to core skaters while building a world that's open and appealing to everyone?

Renken: Skate culture is super aspirational. At the core of it, San Vansterdam is a new city in a series of amazing ones that we've made, and we feel like it's a world open for interpretation. At the end of the day, that's what players are looking for.

It's a world we rooted in community, a place that gives players a sense of ownership, especially as we move forward and build upon what we have already. It honours our legacy in that it gives them all the core elements of Skate that they've always had. And it shows just how new, fresh and exciting skateboarding still can be, even after 15-plus years.

Sen: The best proof that we have many audiences and we can serve them all is the incredible content that our players have been making, which could not be more diverse. It ranges from the absolutely hilarious, to incredibly staged, really artistically done, and to people doing goofy group challenges.

It's a testament to what skateboarding is actually like in the real world. You can do it competitively, you can do it not competitively. You can do it solo or not solo. Art is imitating life in the game. For that reason, even if there

are pockets of community that have different motivations, Skate can easily serve all of them. We're seeing that out there in the real world. We've had 15 million players as of a couple of weeks ago. You don't get those kinds of numbers if you can't appeal to a truly diverse set of people.

How did you define success for this campaign – was it about reach, reputation, or rebuilding excitement with a passionate fanbase that had waited 15 years?

Sen: We're here to build cultural platforms, and so all of those KPIs are important to bring players back in day after day. But really, all of it is with an eye towards the future and building a third place that will resonate forever with our players.

This isn't a one-and-done launch. That's not the model in gaming anymore. We want to build something long-serving. We're also in early access, which means that what we have out there is not the final product. We're very much building on it. We're constantly looking at how players are behaving in the game, and then changing things about Skate, because we've always said from the start that this is under construction.

EXECUTION

The ad feels raw, cinematic, and real – like an old skate video. What was the creative non-negotiable that kept it feeling that way?

Renken: Live action felt necessary for us because we wanted to convey what it was like to be in our world.

Sammy Gold: There are a lot of brands out there that can mimic skate culture. Facebook can get their fisheye lens on and shoot something for Instagram where people are skateboarding. The challenge for us was creating something that actually adds to skate culture.

We knew we had to pay homage to where we've been – like with the classic skate video feel – but we wanted to make sure we were pushing it to a level that people hadn't seen before. Whether that's stunts, this insanely diverse subset of people who you wouldn't really see on a skateboard like a bodybuilder or a nun, or the crazy locations that we had, it was about basing the campaign in skate aesthetics and pushing it to this realm beyond.

The hangout idea was the biggest thing that we needed to nail. It's one of those X-factor, intangible things that is difficult to design in a film.

Opraseuth: The concept of the city and San Vansterdam as a place was interesting to us creatively, because it has a lot of implications. If you treat something like a place, it has rules, it has a society, has its own culture and its own promise. That's where it started to get really fun.

We asked: Who lives in this world? What are they doing? It all revolves around the promise of the game, which you can see through the eyes of a skater. How do we build this as a meeting spot that you want to be in?



The ad had a classic skate video feel but pushed to a level that people hadn't seen before

COMMUNITY & COLLABORATION

The cinematographer who worked on the ad is a skater as well. Why was it important to involve real skaters, even behind the scenes?

Gold: It was the number one thing we needed, a real non-negotiable. In the rules of this world, everyone can skate. It doesn't matter whether you're old, young, big or small.

We had almost zero actors on set, which led to this feeling of the actual skate community that we wouldn't have got if we had gone the traditional way. It created a lot of really

organic moments on set. The cameras would stop rolling, and people would just keep skating. There were a lot of things that we probably would have never captured had there not been that many skaters making this fake city that we built their own. That allowed us to create the experience of the game in real life.

What did you learn from this campaign on how to co-create with a passionate community?

Gold: Having people who live and breathe the world you're in is extremely important. That doesn't mean you need to have the biggest names or the most expensive, crazy equipment.

'Having people who live and breathe the world you're in is extremely important... you've got to just let them play at some points'

Sammy Gold, Uncommon

As far as co-creating with the community, you've got to just let them play at some points. When you're on set, time is always of the essence. But at the end of the day, you've got to let skaters be skaters. Doing that led to the best moments of the entire film, because you get some things you wouldn't get with a heavily scripted scene.

Renken: This was just us holding a mirror up to handshake skate culture. We knew we were doing it right when we had created an environment where our team of 200-plus skateboarders felt comfortable enough to just skate and be themselves. What we captured in the Drop In film is, at its core, just people having fun.

MEDIA PLAN & REFLECTIONS

What was the thinking behind the media plan?

Sen: We have a hero launch film piece, but that's just one small part of the entire ecosystem around this. Uncommon also made a great long-form documentary-style video around it. It's called *Sun Day in San Vansterdam* and it's on our YouTube channel. It's meant to imitate the skate tapes that are out there for every iconic city.

People are consuming this content in a big way. We want to be a part of that and show up for anybody who's watching skate content organically. Same thing with the creators that we're working with. They're real skateboarding creators, not just gaming creators.

The media plan wasn't built to be the kind of campaign that you wallpaper around. We didn't have the budget for that. It was important for this to be able to carry its own weight through the community, the talent and the influencers. So casting was really important for us. We wanted to partner with people who were prominent members of the skateboarding community, including athletes.

When we weren't shooting, we were letting folks come onto the set and create their own content. We invited skateboarding creators from Mexico City to come and shoot their own thing on the set, unsupervised by us. That was another earned media engine. We partnered with authentic skateboarding outlets, like *Thrasher* and *Free Skate Magazine*. All of that is reflected in the game design as well – we've got many of those same partners in the game.

Gold: The gaming and skating community in particular knows how to sniff BS out more than any other one. A 30-second ad wouldn't click in the same way as what we did.

The free-to-play model changes the entry point for players.

How did that decision influence your media or creative strategy?

Sen: Historically, what would happen in gaming is you bet everything on a giant celebrity-studded campaign and hope everybody shows up on the day and buys that box at GameStop. That world is now totally gone. We've used the word 'hangout' a lot today, but that is so critical to land, especially for a free-to-play live service game, because we're on all the time.

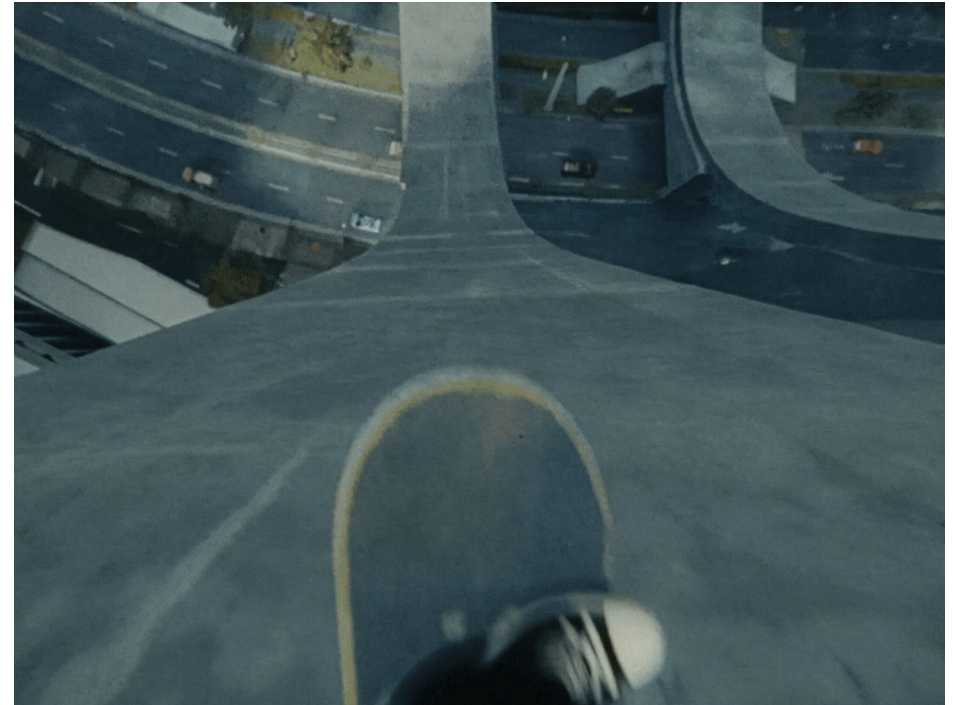
We don't have the money or the time to be advertising 24/7, so we need to make sure that, from the start, people understand that this is a space for them to create, play and do whatever they want in. What we really needed to establish is that this is a place for you as a player to own – not something that you're just going to play once, get through however many hours of, and be done, but a long-standing hangout space that you go to every single day.

Opraseuth: This is how we came to the Drop In campaign. Not only is it borrowing from this iconic thing that skaters do when they drop into a ramp, but it's also serving as an invitation to this world.

What are some of your key takeaways from working on this campaign?

Opraseuth: This might be trite, but trust the process. We all set out with the same intention to build something additive to the culture, and there are a lot of choices that had to be made that we ensured were true to the partnership and to the creative intention.

Renken: Listening is still profoundly important. The goal here was never to impose our own will or a certain narrative in this campaign.



'What we really needed to establish is that this is a place for you as a player to own'

We wanted one to emerge organically, and by building collaboratively and letting skate culture lead, we are able to hold a mirror up to all the amazing things already happening in the space.

Gold: Assembling the right team and letting the people who know this world best do their thing was integral too. Another important thing was details. Making a skate video with your mates in a city that doesn't exist is a very broad idea. There were so many details that we spent a lot of time considering – and those really were the things that brought the intangible factor to the piece.

Sen: Brand and brand ethos still really matter in this world. I've seen a million thought

pieces around all these amazing tools that are emerging in marketing like hyper-personalisation, and we ourselves have the ability to do amazing segmentations of our players. More than ever before, we have a really great understanding of our many different player segments.

All of that is extremely valuable – we studied the shit out of our players and skateboarding culture. I don't want to underplay any of that. But finding the unifying message and putting a big brand statement out there that is meant to be for everyone – not a different one for every possible audience – has been extremely successful. 🟩

Lessons in Brand Creativity /

Five standout Contagious IQ Brand Spotlights that cut to the core of how brands turn creative conviction into results

Over the past year, we've profiled dozens of brands through our Brand Spotlights series – deep dives into how marketing teams turned bold ideas into commercial and cultural success. From global icons to niche challengers, each case study shows how creativity, conviction and clear strategy deliver results.

This collection distills the practical lessons for anyone trying to stay relevant in culture, not just visible in it.



Poppi / Fun First, Function Second

Mini case snapshot / How a functional drink became a cultural accessory by putting fun before function

Poppi was born from a tension: younger consumers want health benefits, but taste still rules. Its early incarnation, Mother Beverage, leaned too far into wellness, with glass bottles and apple cider vinegar purity that limited appeal. The 2020 rebrand swapped earnest for expressive – bright cans, the name Poppi,

and a repositioning as a 'prebiotic soda'.

From the start, Poppi built itself as a TikTok-first company. Co-founder Allison Ellsworth's direct, homemade video sharing the brand's story went viral during lockdown in 2021, driving \$100,000 in overnight sales. That founder-led authenticity shaped everything: employees post freely, and community feed-back feeds into product and design decisions.

Poppi made functional drinks fashionable

'We didn't want to be this functional, better-for-you thing. We wanted to be a culture-first soda'

Allison Ellsworth, co-founder, Poppi

by crossing into lifestyle territory. Fans match their outfits to the cans; creators like Alix Earle and investor Post Malone became genuine advocates because they already lived the brand's values. Sales grew 38x between 2020 and 2024, proving that culture-first strategy can turn a niche health product into a mainstream obsession – and survive scrutiny over its claims.

Read this if...

- You're scaling a niche wellness product for mass appeal
- You target Gen Z or millennials
- You want to use founder and employee authenticity as media
- You're building lifestyle desire around a functional offer

Keywords: Gen Z culture, TikTok marketing, Authentic advocacy, Prebiotic soda, Lifestyle crossover

A24 / Cultivating Creative Distinction

Mini case snapshot / How an indie studio built a cult following by turning auteur cinema into a lifestyle movement

A24 turned auteur cinema into a lifestyle brand. The studio's inception was driven by the belief that dominant studios were anaesthetising creativity and wiping out bold independent cinema, necessitating a calculated risk to inject excitement back into the film landscape at a lower cost.

The studio's stripped-back marketing – no billboards, just striking stills, limited merch and community rituals – lets the work speak and the audience amplify. This approach eschews expensive, generic billboards and television spots, instead favouring guerilla marketing and customised campaigns tailored to each film's distinct tone. This includes creating a Tinder profile for the AI character Ava from *Ex Machina*

or giving the ominous goat from *The Witch* its own Twitter account, subverting the traditional promotion process to spark intrigue.

This community-centric focus has generated a cult following, where fans buy out limited-edition merch and join the AAA24 membership programme for exclusive collectibles. Proof of this model's efficiency is evident: *Everything Everywhere All at Once*, A24's most successful title, earned over \$140m worldwide from a \$25m investment, far exceeding typical returns for independent films. Every project feels singular yet recognisably A24, a rare feat in film.

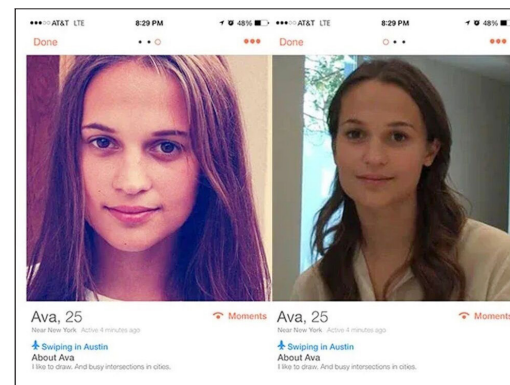
Read this if...

- You want to build brand equity through creative distinctiveness
- You're exploring community-led marketing over paid reach
- You need proof that low-cost, idea-first marketing can scale
- You're looking to balance artistic identity with commercial return

Keywords: Cultural brand building, Independent cinema, Community marketing, Distinctive identity, Creative risk-taking

'A24 is creating a space and cultivating the rise of the new emerging class of auteurs'

Adele Romanski, film producer



The fake Tinder profile for *Ex Machina*'s Ava AI robot



The Witch's devilish goat turned up on Twitter



Nine skin tones, wide sizing and a constant stream of cultural names – like Lana Del Rey (right) – made SKIMS' shapewear a fashion essential

SKIMS / Inclusivity as Commercial Strategy

Mini case snapshot / How shapewear became a \$4bn brand by proving inclusivity can drive scale, not slow it

SKIMS made inclusivity desirable. This pivot was crucial because the existing category leader, Spanx, had failed to evolve, offering limited colour options and sizes, a gap that co-founder Kim Kardashian experienced personally, having to dye items with coffee and tea bags to match her own skin tone. The brand, now

valued at \$4bn, successfully transformed the shapewear category from a functional, taboo garment associated with older women into a body-enhancing essential that appeals directly to millennials and Gen Z consumers. Nine skin tones, wide sizing and relentless celebrity alignment turned shapewear into a fashion essential. The initial collection, with sizes from XXS to XXXXXL, proved that diversity drives the bottom line: the Fits Everybody collection alone accrued a 250,000-person waitlist upon its debut.

The brand's launches feel like cultural drops, its partnerships (Fendi, Nike) expand its reach without diluting its stance. SKIMS strategically positions itself at the intersection of culture and commerce, aligning with figures like Lana Del Rey at the peak of their cultural moments. Teaming up with high-end names like Fendi and Dolce & Gabbana elevated the

brand's status, with the Fendi collaboration selling \$1m in the first minute and the D&G collection subsequently crashing the website. Inclusivity here isn't ethics; it's economics.

Read this if...

- You're rethinking how to modernise a stagnant category
- You want to see inclusivity used as a driver of scale, not sentiment
- You're exploring cultural alignment as a growth tool
- You need evidence that representation and ROI can coexist

Keywords: Inclusive design, Celebrity marketing, Fashion innovation, Cultural branding, Commercial strategy

'SKIMS exists at the intersection of culture and commerce'

Jens Grede, co-owner, SKIMS

Mercado Libre / Reliability as Cultural Swagger

Mini case snapshot / How Latin America's ecommerce leader turned its logistics network into culture through human storytelling

Mercado Libre made delivery cool. By branding the box, not the offer, and turning logistics into storytelling – like QR hunts during live TV – it made reliability feel exciting. The focus was smart: Mercado Libre's real edge was dependable delivery and speed, setting it apart from Chinese discount rivals and fixing Latin America's weak ecommerce infrastructure.

The shift from 'Never stop searching' to 'The best is coming' reframed the brand around the thrill of arrival. Everyday touch-

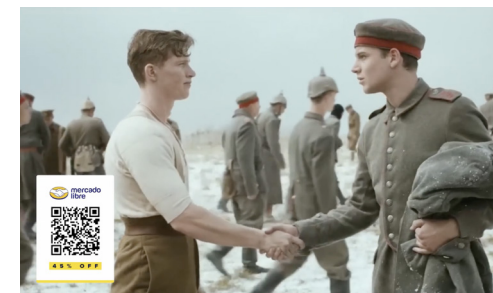
points – the box, van, doorbell, handshake logo – became campaign icons, reinforcing the promise of fast, safe delivery.

The Handshake Hunt campaign turned Black Friday into a gamified QR chase, linking on-air moments to real offers. Five million vouchers were claimed and 925,000 coupons redeemed in Brazil.

Read this if...

- You're turning a functional strength into emotional territory
- You want to make logistics or service the story
- You're exploring brand-building through everyday touchpoints
- You need proof that reliability can create excitement

Keywords: Brand storytelling, Service innovation, Ecommerce marketing, Functional branding, Latin American strategy



Mercado Libre made delivery culture – the Handshake Hunt turned a simple asset into country-wide play

'Logistics is not a very cool thing but it's a core brand equity builder so we're always reinforcing the message in our communications that it's about speed and reliability'

Sean Summers, CMO, Mercado Libre



Jellycat's high-end pop-ups at Selfridges (top) and a Parisian patisserie (left) drive demand for its cute plushies

Jellycat / Cultivating Adult Collectability

Mini case snapshot / How a children's toy label grew up with its audience, turning plush absurdity into design-led obsession

Jellycat turned a toy maker into a cult design brand. The original plush animals, launched in 1999, were aimed at newborns, but the brand needed to reach adults. Its pivot came through anthropomorphised absurdity – plush pickles, cheeses and toilet rolls – that played to nostalgia and collector culture. The bet worked: the 'kidult' market grew over 8% in 2024, accounting for nearly £1 in every £3 spent on toys.

Jellycat fuels scarcity and hype through limited runs, frequent refreshes and high-end pop-ups like the Jellycat Diner, where plush

'food' is served and rare characters sell out in minutes. Discontinued items now trade for triple their retail price. These meticulously designed events double as viral content, driving a 37% revenue surge in 2023. Soft power, literally.

In an increasingly polarised world, Jellycat is a unifying, apolitical brand with broad appeal and a great example of how offering comfort and joy can really resonate.

Read this if...

- You're exploring how to age up a youth-focused brand
- You're interested in turning community enthusiasm into collectability
- You want to see scarcity used as a creative and commercial strategy
- You're studying how design-led novelty drives long-term value

Keywords: Collectable culture, Brand extension, Limited edition strategy, Nostalgia marketing, Toy industry innovation

'We try not to consider possible limitations so as not to restrict our imagination'

William Gatacre, co-founder, Jellycat

Richard Shotton on hacking the human mind /

The behavioural science expert on why marketers should focus less on cultural fads and more on human constants

In 2023, Contagious spoke to behavioural scientist Richard Shotton about all things behavioural biases ahead of the launch of his second book, *The Illusion of Choice*.

Two years later Shotton has co-authored his third book, *Hacking The Human Mind: The Behavioral Science Secrets Behind 17 of the World's Best Brands*. He wrote it with Michael Aaron Flicker, fellow co-founder of the US-based behavioural science consultancy The Consumer Behavior Lab, and co-host of their podcast, Behavioral Science for Brands.

Much like Shotton's previous books, *Hacking The Human Mind* is still very much grounded in exploring the behavioural biases that marketers should add to their toolkit

(36 of them in fact). However, unlike Shotton's past books, the latest work outlines these biases in the context of 17 select brands that have achieved success through their synergistic use of multiple scientifically backed hacks. As Shotton puts it, 'Often, when you look at the best brands, it's this layering of one or two biases together that makes them really potent.'

Contagious sat down with Shotton to discuss the key themes of the book, talking through the science behind familiar and forgotten tactics such as humour and nostalgia, how to master distinctiveness, and why marketers should spend more time focusing on the stability of human nature and not just the instability of culture and technological development.



The book spotlights brands using multiple behavioural science principles, rather than tackling them one by one. What drove that shift?

Whenever I do talks about behavioural science, it's always the examples that really land the point, people can get lost in the abstract experiments. Sometimes, if you just talk about experiments, the role for marketing doesn't seem quite clear. But if you talk about a brand that has demonstrated one of these principles, it's much, much easier to understand. And one of my frustrations is when behavioural science is talked about in this academic, abstract way because it reduces the probability marketers use it – and there's so much more opportunity to boost the effectiveness with behavioural science.



Snickers / You're Not You When You're Hungry

The other way was to think about how marketers learn from best practice, because it sounds really easy at first, you find out who's doing really well in your category or adjacent category. Look at what they've done, you copy what they've done. But the problem with that is, if you're talking about a company the size of Dyson or Red Bull or Snickers, they don't just do one thing at a time. They're often doing hundreds of things concurrently. So it's very hard to know whether an action a brand has done has contributed to their success or detracted or made no difference.

So what we did was look at 17 of the world's best brands, look at all the different tactics they've deployed, then overlaid those tactics with the behavioural science lens.

You spotlight Snickers. Why has its tagline been so effective at closing the intention-action gap?

There's a belief in marketing that if you just make your product appealing enough, then purchase will follow. But the intention to action gap suggests that's not the case. The two things are related, but they don't move in lockstep. There are a number of experiments, I talked about the [researcher] Sarah Milne one in the book that says, if you increase desire to change behaviour, it can often fail to translate into actual behaviour change. And Milne's argument is, motivation is a necessary, but not sufficient condition for behaviour change. What you need to do is associate whatever behaviour you want to encourage, with a very clear trigger moment – so that is a time, a place or a mood. If you do that 'appeal plus trigger' moment, you're much more likely to change behaviour.

What Snickers do so well is they are very clear about when to think about Snickers,

'There's a belief in marketing that if you just make your product appealing enough, then purchase will follow. But the intention to action gap suggests that's not the case'

Richard Shotton

about what moment their products could be consumed in – 'You're not you when you're hungry'. They're associating consumption with that feeling of confusion that comes from hunger. Now that's one example using the book, but it's not unique.

You look around and you see this happening again and again. The best advertising often includes this trigger moment. 'Have a break, have a KitKat', they're not talking about why it's an amazing tasting chocolate bar, but they are associated very clearly in people's minds, that when you have a break, you have a KitKat.

The interesting thing here, and Milne makes this argument, is that people who want to change behaviour – like marketers – they do the really hard work of increasing motivation, and they miss out a simple thing, which is that very clear association of consumption or purchase with a time, place or mood. The trigger moment acts as a catalyst. So you take this kind of vague, nebulous desire to exercise or to consume a chocolate bar, and the trigger moment converts that vague desire into concrete action.

You also link humour to lowering price sensitivity. What's the science behind that?

What I've been quite interested in over the last couple of years is how the mood that someone is in affects their interaction with advertising. There's some lovely work by Fred Bronner that shows if people are in a good mood, they're much more likely to notice ads. I replicated his study. But rather than looking at noticeability, I looked at likability and saw the same effect. If someone was in a positive mood, they were much more likely to positively react to the same ad as someone in a bad mood.

For this book, I've put some newer research in which I did with [head of strategy at Carat] Chris Davies and [agency development partner at News UK] Ben Saxon. So we talked to 821 people, showed them a series of promotional ads – it might be a bottle of Baileys for a tenner or a pizza and beer deal – and we just asked them how valuable they thought the offer was. Later on, we asked them to rate their mood from very bad to very good.

We saw this super clear pattern: people who were in a good mood were 26% more likely to think the promotion was a good deal than those who were in a bad mood. So exactly the same promotion offer was treated very differently based on people's pre-existing mood.

The argument here is actually what you say as an advertiser is only half of the puzzle. What also matters is what people bring to the situation. If you're in a positive mood, you are much more likely to focus on the upside of purchase and all the benefits you might get, whereas, if in a bad mood, you downplay those upsides. You're sceptical about the taste of the Snickers or whether or not 10 pounds is really such a good deal for a Baileys, and you probably focus more on the opportunity cost.

Now, obviously you can try and target moments when people are already happy, but it's a little bit crude. The best opportunity is to put someone in a good mood and that's what humour does so well. Snickers have this wonderful approach to their ads that makes people laugh and then that unlocks their wallets.

The challenge of the brand is to match the right type of humour to what they stand for. There's often a belief that, 'Oh, we're a premium brand, we're sophisticated, we can't possibly do humour'. Then, you think about what *The Economist* did. 'I never read *The Economist*, management trainee, age 42' That is a very sophisticated piece of humour. There's some clever wordplay that people need to solve that matches their brand values perfectly.

Not everything has to be slapstick, Mr Bean, physical humour. Humour is a broad enough category, there are lots of different types that different brands can draw on.



The Economist / I Never Read the Economist

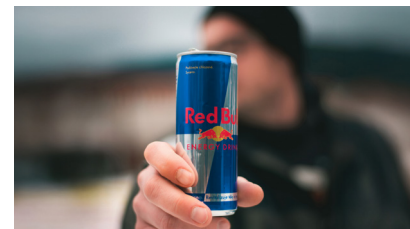


Hovis / Boy on the Bike (1973)

You cover nostalgia as a tactic. What makes it effective for brands?

This was an area that I was much less familiar with. There's a study by [marketing professor] Jannine Lasaleta. She shows people a series of print ads, and the participants are randomised into two groups. Sometimes they are told to recall a special memory from the past in the print ad, other times they're asked to think about a special moment in the future.

What she finds is, when she looks at people's willingness to pay for the products being advertised, you've got this huge variation. People who are put into this nostalgic frame of mind are much more open to spending money.



Red Bull's 'thin' can justifies its higher price

Her argument is that there are generally two ways to secure things in life, either through money or through your social connections, and these two ways of thinking tend to crowd each other out. So if you're reminded of nostalgic times with people in the past, it reduces the role of money in people's lives, and they become less price sensitive.

So there is a tactic that could probably be applied far more regularly to brands in this use of nostalgia, because it's not that common. You can think of some amazing ads in the past, like the Hovis ad, that have done that very well, but most ads you'll see today won't be using nostalgia. So not only you've got this

opportunity for reduction of price sensitivity, the fact that it's an underused tactic makes it distinctive, and we know that increases probability for people to remember the ad.

You also show how brands justify higher prices, like Red Bull with its smaller can. What's the theory there?

One of the big themes of people's willingness to pay is they don't look at a product and think, 'how much benefit am I going to get', then compare it with the price and then work out a cost per unit of utility. They don't do that because that would be a ridiculously complicated calculation.

There's an argument from [psychologist] Daniel Kahneman that when people are faced with complex calculations, they tend to replace them with simple ones that give them almost as good an answer. So if the complex calculation is to work out cost per unit of utility. The simple question is, what have I paid for something similar? So the argument here is, if you can change people's mental comparison set, you can change their willingness to pay.

Rory Sutherland has put together an amazingly logical argument about why it works. What I wanted to do is put some experimental evidence behind that. I've done this four or five times now, I've done it with cars, tea, and then this time ice cream. You show someone a base product. You show some Ben & Jerry's, 250g tub, compare it to an own-label brand, and then people think Ben & Jerry's is pretty poor value. You then get a new group of people, show them the same Ben & Jerry's tub, the same price, but you compare it to Halo Top, and suddenly they think Ben & Jerry's is an absolute steal.

It shows that the same product at the same price doesn't have a fixed value perception – whether people think it's a good deal or a bad deal depends on what it's compared to. That principle can be applied in all sorts of areas.

The argument with Red Bull would be that when they launched, they were much more expensive than other soft drinks, but every other soft drink was in a squat 330ml can. If Red Bull had put their drink in that size of can, that shape of can, people would have compared it to Fanta and 7up and Coke, and thought, 'Well, this is expensive. It's twice as much. I'm going to avoid it'. But by putting into this tall, thin, smaller, cylindrical can, it breaks that frame of reference. It creates its own new category. And because it is its own fresh new category, you've got this floating willingness to pay. Craft beer did exactly the same thing.

Does brand heritage limit the ability to re-anchor price?

The Deutsche Bahn example is an amazing one where they got the doppelganger [landmark] sites and then started comparing themselves to transatlantic flights. That is a legacy brand. Deutsche Bahn is 150 years old, but with this, almost, sleight of hand, very clever, creative approach, it made it look like a reasonable thing to compare the rail fare with the transatlantic flight, because you've got these two very similar images, one place you can reach by rail, one by plane. It almost gave it this veneer of comparability.

The other brilliant one is, John Steel [former planning director at WPP] did a book called *Perfect Pitch*. He talks about Bell helmets. They used to charge a premium versus standard cycling brands. No one was buying them

because they didn't want to pay an extra \$5. So the line that they came up with was, 'Does your kid have \$100 feet and a \$10 head?' and then next to it was a picture of a girl with some very fancy Nike Jordans. They've been around for ages, but they managed to make people shift the comparison from the cheaper cycling helmets to, 'Why the hell am I splashing hundreds of dollars on fashion, when, of course, that isn't as important as safety?'

You warn that many brands lack distinctiveness because of the wind tunnel effect. What is it, and why does it matter?

The wind tunnel effect is more of a hypothesis. I think it was Jim Carroll [former UK chairman at BBH] who first came up with this idea. He used the analogy of cars originally. Somewhere around

the 1980s what you notice is, you had this huge divergence of car shapes and sizes and looks, but over the next few years, they all settled on a very similar styling. His argument is, well, they all adopted the same testing mechanism. They put everything through a wind tunnel. There are certain physics of aerodynamics, so you're going to get cars that look remarkably similar. With too rigid a focus on testing, with too rigid of a focus on slightly facile customer insights, you end up with the same situation in marketing. And lots of brands start to look remarkably similar.

The problem with that is, even if those approaches are sensible in and of themselves, the Von Restorff effect suggests you've got to think about the context you're operating in. An interesting example is Skittles. During Pride Week they used to say, 'We'll give back the rainbow', and they had completely black-and-white packaging. Now that makes them stand out brilliantly in the sweets aisle, because they are surrounded by loads of packaging using Day-Glo colours.

There's too much testing in isolation, too rigid a belief in what customers tell us as the reasons why they purchase.

Are there any different approaches to testing that you think brands should be taking more often instead?

Brands spend far too long asking customers how they behave – surveys, focus groups – and from a behavioural science perspective, that's problematic. The University of Virginia psychologist Timothy Wilson says we are strangers to ourselves. He makes the argument that people don't have introspective insights about their own motivations. So if you ask someone

'There's too much testing in isolation, too rigid a belief in what customers tell us as the reasons why they purchase'

Richard Shotton



Arizona, USA: 1,156 Euros



Rhineland, Germany: 19 Euros



Deutsche Bahn matched German towns with stunning foreign counterparts to promote train travel

why they bought a particular pint of lager, they will give you a very small subset of their actual motivations. They'll talk about very sensible, logical, rational things that they could defend if they were questioned. They'll talk about the refreshment, the taste, the price.

What they won't talk about, and probably don't even realise might motivate them is that they may have heard what the person next to them was ordering, or it was the first thing that caught their eye when they walked in. Now there's all these small, fleeting factors that have a huge impact that we don't quite even admit to ourselves influence our purchasing. If you take it at face value, because people don't have this full introspective insight, it will often send you off in the wrong direction.

What people should do far more of is experiments. If you have a website or you have a number of shops, simple A/B tests on the website, about which biases work. Trying some messaging in half of your pub chains and a different type in the other half, that's a much more accurate way of understanding genuine insights into human behaviour – look at what people do rather than look at what they say.

Monadic testing is one of the most simple techniques, any researcher can easily do it. You randomise people into two different groups. You show them almost the same stim-

uli, but you just change one thing between the two options and people just see one of those stimuli. Then, any difference in response you attribute back to that single change variable.

The illusion of effort is a key theme. What are the best examples, and how can marketers apply it well?

The study was we showed people a fake vodka brand and asked people to rate how much they liked the imagery. And sometimes we said it had gone through 143 versions, other times we mentioned nothing about all the different versions they've been through.

We saw that exactly the same imagery was rated, 20-30% better if people thought it had gone through lots of iterations. That's the illusion of effort. If we think lots of effort has gone into products, we will rate it higher. It's exactly the same product, but if it's got this story of effort around it will be rated higher than if that story is absent.

You've got these classic examples like Dyson, where they straight out state the effort that's gone into the number of prototypes. But then above and beyond that, you've got these more subtle versions, in things like design or ecommerce. So, the design of the Dyson [vacuum], it is a transparent casing, and that allows people to see the work that's going on.

Now, if it had just been this kind of opaque casing, it wouldn't have tapped into the buyer so powerfully.

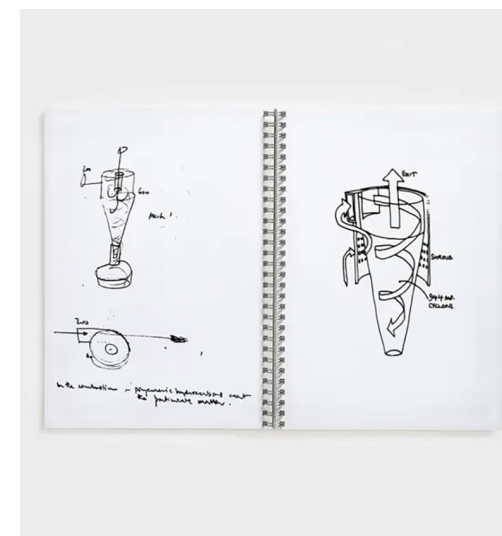
Often, when you look at the best brands, it's this layering of one or two biases together that makes them really potent. Dyson didn't go out and say, we've got 5,000 prototypes. It was 5,127. It's that precision plus the illusion of effort that elevates it from other uses of the bias. In fact, probably it's mere exposure. They've gone on about it forever. It's a precise number, we know that's more believable. It's this kind of combination that gets the biggest effect.

Is enduring human behaviour more important for marketers than shifting trends?

A central argument of the book would be, human nature doesn't change. There's that wonderful [Bill] Bernbach quote about how it might be fashionable to talk about the changing man, but as communicators, we should be concerned with the unchanging man. What these experiments show is often what influences that unchanging man.

If you think about evolutionary psychology as the driver of human nature, you realise it's ludicrous to think anything should change in five to 10 years, because that's just a blink of an eye in the hundreds of thousands of years we've been around.

People have got to hold these slightly seemingly contradictory thoughts in their head at one time. Human nature doesn't change, but technology and culture might well change, and maybe an example of that is AI. Of course, AI wasn't here 15 years ago, so this is a new piece of technology, but actually the same principles that we've been discussing today, they still hold, the illusion of effort still holds.



Dyson went through 5,127 vacuum prototypes

People's experience of ChatGPT or Claude is that you put in a prompt and it spits out a blog post or a detailed answer in a few seconds. So people assume that an AI generated poster is low effort, and therefore it's less valuable. That's an example of where there's a brand new technology, but the biases that affect our interaction with that technology, they are age old.

For writing, in two years' time people will be much more attuned to the stylistic quirks of the various different large language models. There are certain signals that something's been written with AI. And the crucial thing is not to leave those in because if people think a blog post has been written with AI, even if it's phenomenally insightful, they will rate it worse because of this assumed low level of effort. So these age old biases can illuminate the best way to use a new tool. 📌

'If you think about evolutionary psychology as the driver of human nature, you realise it's ludicrous to think anything should change in five to 10 years'

Richard Shotton

CMO Survival Guide /

Five lessons from a year of in-depth CMO interviews on IQ

After a year of Contagious IQ interviews with CMOs, brand leads and creative partners, one pattern was impossible to miss. Across sectors, budgets and audiences, the brands cutting through are led by people quietly rewriting how marketing works – giving up control, building ideas that endure, and treating creativity as a living system, not a campaign.

1. Control Kills Creativity /

The most culturally fluent brands have stopped trying to manage culture. They treat creators as collaborators, not contractors, and know that control kills authenticity. Younger audiences can tell when a brand is performing fluency instead of earning it.

‘If you want to be a brand that actually reaches people, you’ve got to be entertaining. There is no such thing as a captive audience; they’ve always got other places to go.’

Rachel Delphin, CMO, Twitch

‘The old way of marketing was control. The new way of marketing is creative currency.’

Esi Eggleston Bracey, Chief Growth and Marketing Officer, Unilever

‘The truth is if you box a creator in then why are you spending the money?’

Alyson Griffin, Head of Marketing, State Farm

Why it matters:

Creativity isn’t owned by brands anymore. The brands that thrive are the ones building with culture, not on top of it.

2. The Discipline of Repetition /

The strongest brands stay on message long enough for the market to remember. Consistency isn't conservatism; it's a creative act – holding your ground while culture moves around you.

‘Consistency isn’t even a question for us. Consistency is a fundamental.’

Calum Laming, Chief Customer Officer, British Airways

‘The basic human need for breaks remains constant. What’s kept the Have a Break platform fresh is our willingness to evolve how we interpret this truth.’

Wael Jabi, Global Head of Marketing, KitKat

‘The strongest brands in the world are the ones that are masters at repetition.’

Gary Raucher, Global Head of Marketing, Asics

‘I’m increasingly of the view that consistency is one of the things that we undervalue.’

David Mogensen, VP of Global Marketing, Uber

Why it matters:

Audiences don't tire of your message as fast as you do. Creative endurance compounds faster than novelty.

3. Perfection is the Enemy of Growth /

The brands moving fastest have stopped chasing flawless planning. They've built systems for experimentation – carving out space for risk, for the ideas that might fail but could also reset a category.

‘We have to take risks because the landscape is changing too quickly and customers’ needs are changing too quickly. It’s not an experiment if you know you’re going to succeed every time.’

Claudine Cheever, Vice President of Global Brand and Marketing, Amazon

‘Crazy shit... creates talkability, makes you culturally relevant, makes you uncomfortable, makes you learn something. Sometimes it works, sometimes it doesn’t.’

Sean Summers, CMO, Mercado Libre

‘The pace and speed we work at is unlike anything I’ve ever seen anywhere... We turned around one of our largest brand campaigns in three weeks. Most brands would have taken a year.’

David Mogensen, VP of Global Marketing, Uber

Why it matters:

If you only back safe ideas, you’ll never find new ones.

4. You Can't Advertise Your Way Out of a Bad Experience /

For service-led and premium brands, marketing no longer stops at the ad. The real work is ensuring the creative idea shapes the full customer journey – and that teams embody the promise being sold.

‘We try to use our brand and our brand positioning as a strategic filter for everything we do.’

Gary Raucher, Global Head of Marketing, Asics

‘People think marketing stops at the campaign – it absolutely doesn’t. It has to go right through.’

Calum Laming, Chief Customer Officer, British Airways

‘You are only as strong as your weakest link. You can excel at almost everything, but people will only remember the shitty part of the experience.’

Sean Summers, CMO, Mercado Libre

Why it matters:

The best campaigns fail if the experience doesn’t match them. Consistency now extends from copy to call centre.

5. Awareness is Maintenance. Relevance is Growth /

Legacy and low-interest brands can't rely on fame alone. Staying relevant means rewriting what the brand stands for without abandoning what made it famous. It demands new creative codes, new collaborators and the nerve to trade familiarity for cultural traction.

‘People look at a brand like Salomon and it’s human. Skechers just make shoes.’

Scott Mellin, Global Chief Brand Officer, Salomon

‘Functional benefits are important, but for me it’s important that we build more humanity in the brand and not just play a functional game – that we differentiate on the personality of Uber.’

David Mogensen, VP of Global Marketing, Uber

‘State Farm is the largest insurer in the US, we don’t have an awareness problem at all. We have a relevance issue.’

Alyson Griffin, Head of Marketing, State Farm

Why it matters:

Being known isn’t enough. The harder part is giving people a reason to care.

Experience 2.0: Designing Systems for the Age of Abundance /

What happens when we reach the limit of attention, and why brand building needs a system that balances emotional creativity with algorithmic negotiation. *By Rohan Tambyrajah*

For more than a decade, the marketing industry has been running a quiet experiment: how far can you stretch a model built on finite human attention inside an environment of infinite content?

We've now arrived at the answer. Not much further.

Over the last 10 years, consumers have spent slightly more time with media. Minutes have crept up; nothing dramatic. What has grown dramatically is everything around that time: the number of touchpoints people use, the number of platforms carrying ads, and the sheer volume of content being poured into those pipes. Fragmentation is up. And as we pass the point where Gen-AI content exceeds human-made content, supply is up

exponentially. But the ceiling of human time – 24 unmovable hours – obviously, cannot move.

When an ecosystem is built on the assumption that time will keep expanding, eventually the economics breaks. And right now, you can feel the breakage everywhere: falling attention to media, eroding brand trust and marketing profitability in decline. All points to an industry trying to grow inside walls that no longer stretch.

There is a simple truth to this: abundance breaks models that depend on scarcity. And marketing is a scarcity-based system being run in an age of absolute abundance.

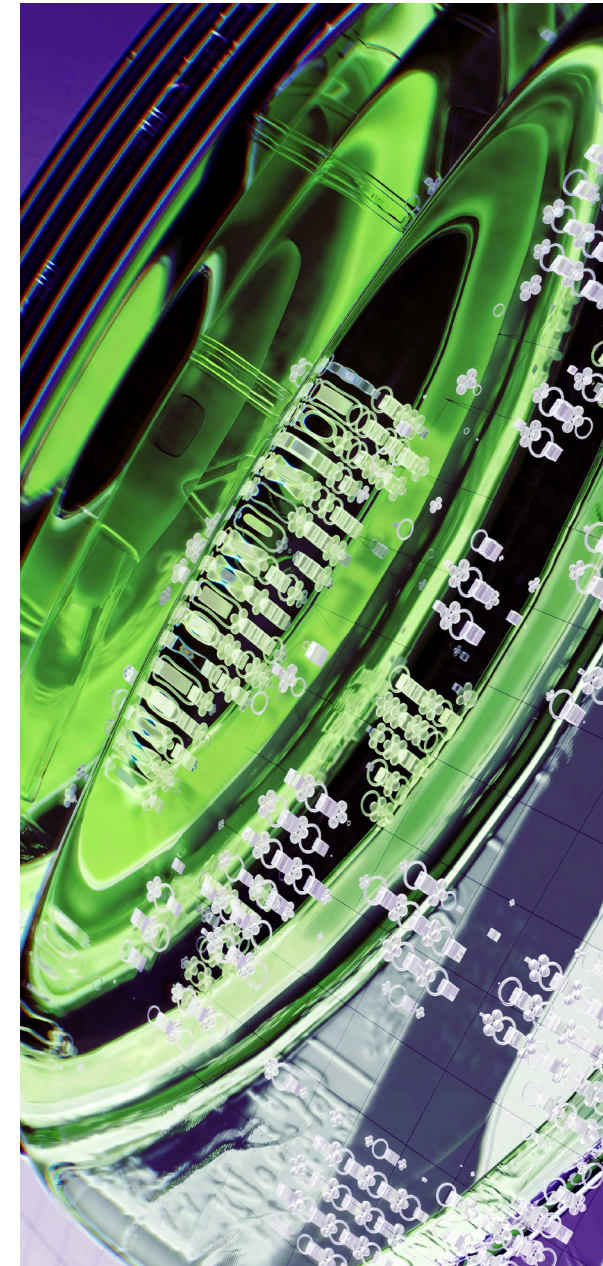
Abundance cannot be managed by minds, so it will be outsourced to machines.

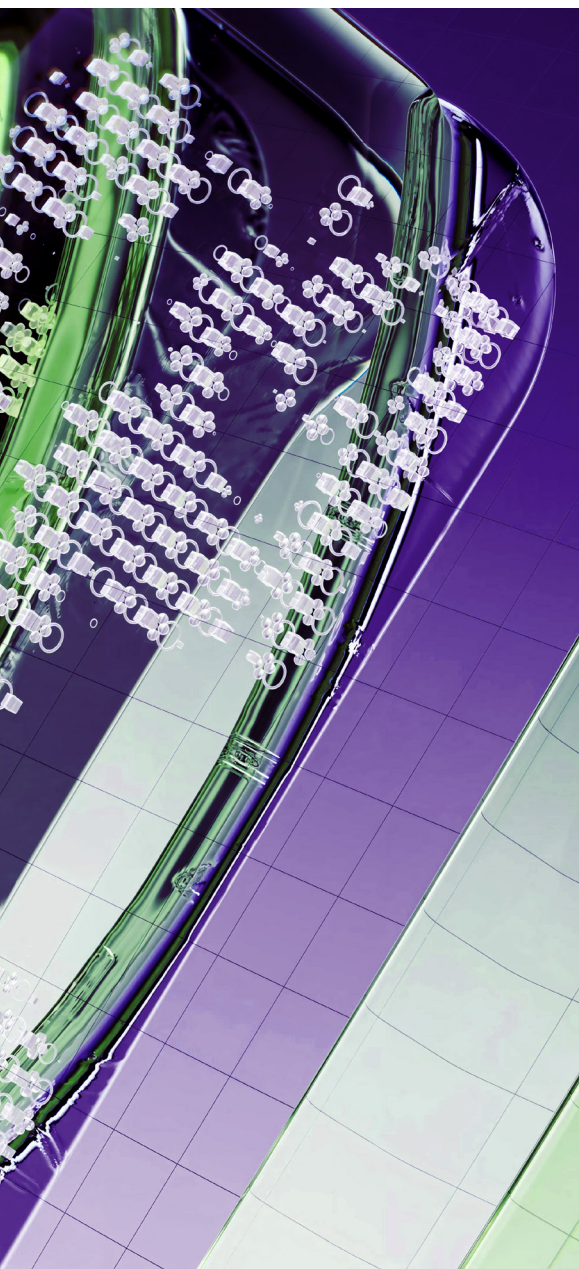
We can't slow the content machine. Nor can we

ask humans to squeeze more hours out of the day. So, the system will evolve. And it already is.

Consumers are already delegating decisions to machines. We plan our travel with AI copilots. We shop through agentic journeys that collapse dozens of micro-decisions into a single prompt. We rely on operating systems that decide what to surface, what to prioritise, and what to hide. As generative models scale, an extraordinary statistic becomes almost mundane: by 2030, most content online will never be seen by a human at all.

When an environment becomes too complex for human cognition to manage, we outsource thinking. The next major shift in marketing is exactly this outsourcing: the arrival of an agentic layer that filters abundance on our behalf.





Inside this new layer sits a new question: If the role of a brand is to influence choice, what happens when a machine is the one making the choice?

The line of indifference

The answer is uncomfortable but inevitable: large swathes of categories will become agent-to-agent ecosystems, where machines negotiate value on behalf of people. Lowest cost. Fastest fulfilment. Most functional utility. These aren't emotional choices, they're computational ones.

Products and services that sit below the line of indifference will be automated. Here, brands risk becoming interchangeable inputs in machine-optimised decisions.

But above the line of indifference, something profoundly human remains. People don't choose based solely on function – they choose based on meaning. Identity. Emotion. Signals. Stories. Feeling.

That is where a difference is created. In an automated world, emotional value doesn't disappear; it becomes a greater competitive advantage. Machines will handle the functional. People will choose the meaningful.

The shift to an experience system

This is the structural gap where many marketers get stuck. The models that built the last decade – screens, channels, and funnels – were designed for a world where influence flowed linearly and predictably. Today, influence moves fluidly across humans, creators, agents, and autonomous systems.

The answer isn't a new funnel. It's a new system. A system where brands, consumers, agents and influencers operate inside one connected model. A system where emotional

creativity and algorithmic negotiation work in parallel.

A system designed not just to win hearts and minds, but to win models – the ones now determining which brands surface, which are recommended, and which experiences are elevated.

At PHD, we call this Experience 2.0 – a system that operates across four modes of modern marketing:

1. Brand > Consumer

Building a distinctive meaning that elevates brands above the line of indifference. Creativity that resonates with humans and becomes machine-recognisable and machine-recommendable.

2. Consumer > Consumer

Real human connection. Communities, creators, and co-creation – the parts of culture that algorithms can amplify but never originate.

3. Agent > Consumer

Where AI becomes UI. Brands will personify and become 'living' entities. Interfaces will be conversational. Agents will become the front door to products, services and relationships.

4. Agent > Agent

Machines negotiating for people. Weekly shop optimisers. Autonomous service brokers. Protocols and models are becoming new battlegrounds for value and visibility.

These modes don't replace what we know. They reorganise it for the world we're entering. Together they form a system that can operate in abundance rather than collapse under it.

'In an automated world, emotional value doesn't disappear; it becomes a greater competitive advantage'

What marketers should take from this moment

The industry has reached the end of 'more': more content, more touchpoints, more minutes spent. That curve is flattening. The next curve belongs to marketers who learn to operate with abundance, not against it.

The opportunity is enormous: to build brands that feel unmistakably human but operate like systems, emotionally resonant on the surface, computationally powerful underneath.

The brands that win won't be those making the most content. They will be those designing the best systems: agent-powered, emotionally elevated and connected end-to-end.

Because in a world where machines make more choices, the brands that thrive will be bilingual: fluent in the languages of humans and agents. ■■■

PHD helps brands outthink, outpace, and outgrow through Intelligence. Connected. — uniting people, data, and capabilities into one connected experience. Learn more at phdmedia.com.

How to build a brand for Gen Z /

The Contagious guide to marketing to a shortchanged and divided generation of consumers

Gen Z: perennially online, performative activists with short attention spans and a taste for instant gratification. The stereotypes are as lazy as their allegedly poor work ethic. These labels differ little from the tropes we used to reduce millennials to ‘flannel shirts’, but times have changed. Brands can’t expect to win with Gen Z by following the same playbook they used on the preceding generation.

So, put aside your preconceptions about ‘snowflakes’. Gen Z has reason to feel aggrieved. Economic insecurity defines much of their experience: **40%** of Gen Z households fall into the low-income bracket, and they’re 25% more likely to do so than the average consumer. Housing is disproportionately unaffordable. More than **50%** of US Gen Z adults still live with their parents, a higher proportion than during the Great Depression, while the 2021 UK census recorded a **15%** rise in adult children living at home since 2011.

They are also the loneliest generation on record. Hyperconnected yet isolated, **80%** of Gen Z globally reported feeling lonely at some point in the past year, and studies suggest they may be even **lonelier** than over 65s.

Feeling powerless deepens the frustration. With an average board director age of 60 years old, despite half the world’s population being under 30, the imbalance is obvious. As Kian Bakhtiari, founder of Gen Z consultancy The People **puts it**: ‘If you think about policy, if you think about investment, you think about power, young people are locked out.’ The result? Gen Z either disengages – or starts creating its own platforms.

That self-starting impulse fuels the side hustle economy – which, according to Bakhtiari, stems from ‘the economic reality that their day job isn’t covering the bills.’ These ventures also offer achievable milestones in place of traditional ones like home ownership or marriage. It’s the same energy behind trends

like **The Great Lock In** and grind culture – part self-improvement, part performance. It’s also the mark of a cohort that lacks the professional opportunities of other generations. In China, record youth unemployment means some Gen Z jobseekers are even paying to sit in **‘pretend’ offices**, chasing the feeling of structure and purpose. But not everyone is as receptive to the rigidity of a 9-5 routine. As many as **55%** of Gen Z say they value the flexibility of being able to change their work hours on short notice, seeking more control over their work schedule.

The romanticism of routine and work life from some is symptomatic of anemoia – Gen Z’s nostalgia for eras they never actually lived through. The resurgence of vinyl, tamagotchis and kidult toy collections (Labubu, anyone?) reveal a generation more comfortable looking back than forwards. This escapist impulse offers potential to brands that offer emotional refuge rather than endless novelty.

Still, their nostalgia does not equate to digital withdrawal. Gen Z spends an average of **six hours** a day online, with only **48%** of 16- to 24-year-olds watching live TV weekly

‘The content Gen Z engages with is chaotic and bold, but offline they are anything but – craving more IRL connection’

– down from 76% in 2018. To reach them, brands must be fluent in the platforms and formats they inhabit.

The content Gen Z engages with is chaotic and bold, but offline they are anything but – craving more IRL connection, but overthinking every move for fear of being permanently shamed online. Referencing global Gen Z research by The Heineken Company, Ligia Patrocinio, global head of Desperados, **notes**: ‘If you look at TikTok, there’s so many funny, goofy, mischievous things. It’s almost like TikTok allows them to be themselves. But in real life, they’re really constrained. Across the world there’s this trend of super rationality.’

Identity is complex for a generation spanning teens to late twenties. Economic pressure and limited representation are fuelling a worrying gender divide, amplified by misogynistic far-right influencers targeting disaffected young men. However, in the UK, a YouGov survey **revealed** that a higher percentage of Gen Z men and boys had a positive view of women compared to their Millennial, Gen X and boomer elders.

Overall, Gen Z is broadly progressive: **90%** expect brands to demonstrate purpose beyond profit – even during economic uncertainty; 75% percent say they’re more likely to buy from those donating to charity. They’re also sharp: 70% value emotional intelligence in advertising. They can spot a brand that’s faking it.

But treating Gen Z as a single bloc is a mistake. The youngest are just hitting their teens; the oldest approaching 30. Some are buying homes, some raising children, some forgetting to feed Tamagotchis. Winning strategies recognise this complexity, offering meaning to specific subgroups in ways that align naturally with a brand’s core values.

HOW TO GUIDE

Here's how brands can do just that, and deliver real relevance – not performative pandering:

BRAND BEHAVIOURS: Chase their signals not their trends /

Gen Z aren't just demographically diverse, their fragmented niche interests leave little room for monoculture. What they see is shaped by attention-driven algorithms, not quality, which means anything can go viral.

Trickier still, the subcultures Gen Z engages with are fluid and fleeting. As Isobel Farmiloe, brand strategy director at independent media group Dazed Media **puts** it, 'Young people are treating subcultures like identities in progress... they try them on and move in between them.'

It's impossible, and inauthentic, for any brand to reinvent itself with every passing trend. Instead of chasing cool, brands should focus on the subcultures that are consistent with their brand, and the constants that connect them.

Specifically, brands should study how Gen Z signals with the subcultures they jump between. As Farmiloe explains, 'Subcultures

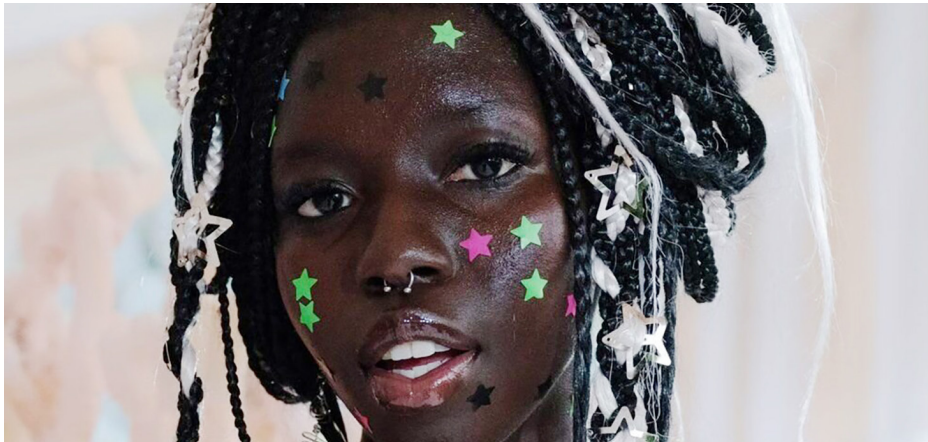
offer belonging... They provide young people with a voice, often in an aesthetic way...The visual you're putting out there in the world is more important now.'

The data backs her up. According to Edelman, **46%** of Gen Z say they judge people based on what brands they buy or use. What you wear, post or carry now speaks volumes: the brands that understand that language win.

Take Starface, the decorative pimple patch brand. Its success is about more than a cute product, it's about what its patches communicate. The brand telegraphs honesty, self-acceptance, transparency. By aligning with Gen Z's unapologetic realness, Starface sidesteps the need to reinvent itself with every new trend. Instead, it can choose its moments for new designs and collabs while staying constant to its core confidence-through-imperfection identity.

Key Lesson / Gen Z is alive to authenticity, so resist the urge to chase culture. They don't want brands to mirror them; they want brands that mean something when they choose to wear, tag or share them.

Pimple patch brand Starface telegraphs honesty, self-acceptance, transparency



Asics' Desk Break campaign aligns with Gen Z's resistance to the weekly 9–5 work grind

Help them help themselves /

Gen Z has had enough of older generations telling them to 'toughen up.' Brands that recognise their reality rather than dismiss it will gain their respect. They want to trust the ethics of the companies they buy from and expect them to help tackle the issues shaping their lives. Simply avoiding missteps isn't enough. According to data from Edelman, **58%** of Gen Z globally agree that if a brand isn't communicating its actions to address societal issues, they assume it's doing nothing or hiding something.

Some of the strongest brand moves empower Gen Z to help themselves. In Ecuador, Banco Del Pacifico allowed young people to secure loans against their **virtual gaming assets**, an innovative solution to the lack of collateral like cars or houses that prevented them from being offered credit. Recognising and legitimising the value of gaming didn't just build the bank's credibility with Gen Z, it showed deep empathy for their real-world challenges.

Similarly, sports brands are adapting their messaging to align with Gen Z's attitudes to exercise. **As** Florian Alt, VP global brand at Adidas, explains, internal research revealed that sport has become joyless for young people as pressure around performance has grown. Their response? A new global platform, 'You Got This,' pivoting from 20 years of the more daunting 'Impossible is Nothing' messaging.

Meanwhile, Asics has pushed employers to include **desk-break** clauses in contracts, acknowledging Gen Z's resistance to rigid 9–5 structures and making space for regular movement. While different strategies, both reframe sport as a source of competence and self-care, not stress.

Key Lesson / Less 'inspiration through impossible feats', more 'empathy expressed through practical change'. Offer tools, solutions, or support that improves their lives to build trust and loyalty with Gen Z.



Bilt's Roomies is short-form done right



Modibodi racked up the Likes tackling taboos

Disguise your ads /

Marketers know it, even if they don't like to admit it: people hate ads. And Gen Z are the best in history at avoiding them. As David Mogensen, VP of global marketing at Uber, **told** Contagious 'There's probably never been a generation that is better at ignoring advertising than today's youth.'

To captivate this audience, brands need to reimagine ads to be entertainment first, advertising second. That's exactly what Bilt did with its hit campaign **Roomies**, a short-form mockumentary following Ellie, a 25-year-old adjusting to life in New York City. Produced entirely in-house, the series barely mentions the brand: Bilt's name appears only in the account bio. But the content landed: 8.3 million Instagram views, 7.4 million TikTok views, and 1.3 million Likes later, Roomies has built a loyal audience that wants to return each week.

As Zoe Oz, Bilt's CMO, told Contagious: 'Marketing has got to the point where consumers can tell that you're marketing to them [...] You can either ignore it and try to push product anyway, or you can learn from it and try to

engage them in content that they want to watch.'

Period wear brand **Modibodi** took a similar route with its TikTok mockumentary series *I'm Dying Inside*, inspired by the menstruation experiences of its young cast and crew. Tackling taboo topics like endometriosis, period sex, and non-binary experiences with refreshing honesty, it received 12 million views in four weeks and helped achieve a 75% sales increase.

Both series build ongoing interaction with Gen Z. By trading ads for bingeable, repeat entertainment that funnels back to their social channels, they create the connected experiences this audience craves. As Javier Meza, CMO for Europe at The Coca-Cola Company, **puts it**, brands should focus on 'creating a continuous ecosystem of experiences where dead ends are avoided.'

Key Lesson / Stop making ads and start building worlds. Subtle branding and culturally fluent storytelling trump overt promotion. Gen Z isn't looking for another campaign – they're looking for content that earns its place in their feed.

Platform for success /

Gen Z practically lives online. As traditional media becomes ever more peripheral to their lives, it's essential for brands to meet this audience in the spaces that really matter to them – and understand how each one actually works. As Conny Kalcher, chief customer officer at Zurich Insurance, **puts it**: 'If you try to do content that's aimed at Facebook and Instagram, and then you put it on TikTok, that's clearly not going to work. You need to adjust to the channel.'

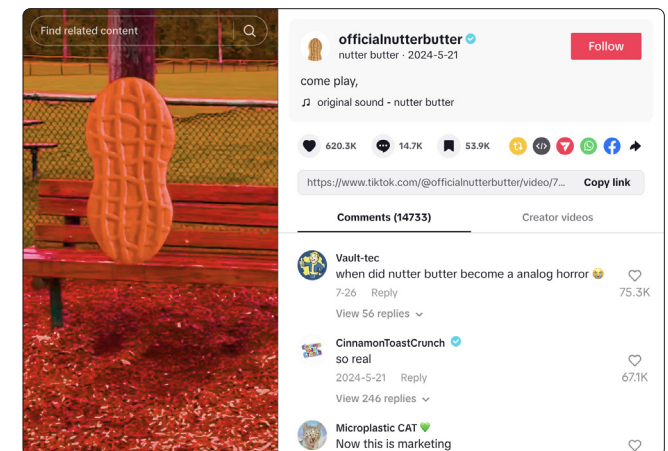
British retailer Currys has become TikTok-fluent by leaning into its platform-specific humour and surrealism. Its bizarre content – including a horse kicking a chicken into an air fryer – taps perfectly into Gen Z's appetite for absurdity, earning more than **7.5 million** likes and contributing to a 52% increase in half-year profits.

Currys isn't alone. Nutter Butter's 'anti-bland' social strategy – and bonkers

'fever dream era' content lifted household penetration among younger consumers by **16.5%**. Duolingo and Scrub Daddy have followed a similar path to cult followings, even teaming up in an unlikely and very Gen Z **collaboration**.

But there's a fine line between clever and cringe. As Tony Wood, VP, head of social marketing and strategy at Dentsu Creative, notes: being weird for the sake of it won't win. Nutter Butter (a Dentsu client) has a natural link to 'nut-tiness' that gives the brand permission to lean in. Forced humour falls flat, especially when it inauthentically mimics what users already create themselves. 'People want to escape... Most social users want something novel,' he says.

Key Lesson / Create content that feels native to the platforms Gen Z inhabits – but if it doesn't feel true to your brand, don't do it. Gen Z rewards brands that are self-aware, not self-conscious.



Currys and Nutter Butter are great case studies in how to turn up on social media

Get out in the real world /

For all their digital immersion, Gen Z's biggest craving is real life connection. Platforms which promised 'friendship at scale' have traded participation for passive viewing: bluntly, Gen Z needs to get out more. They are hungry for physical spaces, communal experiences and real life interactions: that's an opportunity.

As Duolingo CMO Emmanuel Orssaud [tells](#) Contagious 'The trend is to get back in places where people can interact with your brand in the real world, not just through a phone, not just on short-form videos.'

Card game Uno seized the opportunity with [Uno Social Clubs](#) campaign – live, casino-style nights where young adults can play and connect. The experience tapped into Gen Z's love of shared, competitive gameplay and offered a fresh twist on socialising beyond the pub.

Key Lesson / Digital should feed into the physical, not replace it. Explore ideas that give Gen Z spaces and reasons to gather, meet and co-create: bring your brand to life beyond its usual context – and beyond screens.



Creators Druski (left) and Kai Cenat (middle) with actor Kevin Hart



IMAGE: MATTEL

Uno Social Clubs give people a place to play and meet

Invite them to the table /

When Gen Z's favourite content feels unscripted and unpolished, marketing teams can afford to loosen up a little too. Investing in internal youth expertise seems an obvious starting point, whether seeking input from young employees or simply ensuring teams more closely reflect the audiences they target. However, as Bakhtiari notes, this isn't always happening: 'Part of the problem is that marketing people aren't representative of the groups they're trying to connect with.'

The fix isn't complicated: bring Gen Z into the process, as key collaborators, not a token presence. The team behind Dentsu Creative's Nutter Butter proves the point. As Wood explains, 'The misconception is that social marketing is just handed over to our interns... what really makes it work is bringing together multiple cultural viewpoints, various ages, different backgrounds, different life experiences and various levels of industry expertise.'

Similarly, Howatson+Company copywriter Katie Hulton, who worked on Modibodi's content series, says Gen Z members were core to the team: 'Talking to that audience is about diversity and inclusivity, both are so important when it comes to authenticity.'

Sometimes, that means partnering with creators, and the smartest brands are already treating them as creative partners, not just media channels – even if that means ceding some control. As Rachel Delphin, CMO of Twitch, [says](#): 'The best brands are putting the influencers in the driver's seat, giving them the creative brief and asking "What do you want to do?" or "How would you tell that story?"'

Key Lesson / Trust the people who already have the audience – trading a degree of control to gain deeper connection. Gen Z can feel it when a brand's message has been through too many layer of approval... and they scroll right past it. 🟢

Generative Realities /

Dentsu Creative unpacks the key consumer trends shaping 2026 and beyond, backed by new research with audiences across the globe



Escape Velocity, Dentsu Creative Trends 2026

Generative Realities explores the implications of a world where ideas impact culture at the pace of the prompt, and trends collide, combine and regenerate at the speed of the feed.

In any trends report, there are causes and there are symptoms. Or as we like to frame it, things that are trending, things that are timely, and things that are timeless.

In a world where trends ebb and flow at the speed of the algorithm, it can feel impossible to keep up. No sooner do you know your Labubu from your delulu, your soft clubbing from your sauna raves than the feed moves on. The rise of Generative AI and the algorithm's hunger for fresh content create an ever-faster cycle of content creation, mimicry and memeification.

In that context, some trends are easy to dismiss as fads, frivolities or fever dreams. Yet we believe some profound, underlying social shifts and tensions bubble to the surface in these memes and moments. The trends (or symptoms) change, but the fundamentals are vital to understand.

‘Some trends are easy to dismiss as fads, frivolities or fever dreams. Yet we believe some profound, underlying social shifts and tensions bubble to the surface in these memes and moments’

The cost-of-living crisis continues to move traditional adult milestones beyond the reach of younger generations, leading to indulgence in escapism and investment in fandoms, fantasies and fluffy toys – 70% of respondents globally agree ‘Modern life is so stressful sometimes I need to escape’, rising to 80% among Gen Z. We unpack this in a trend we call **Escape Velocity**, exploring the rise of adult collectibles, the charm-ification of everything, the rise of romantasy, and the all-conquering power of cute.

Social fragmentation has also followed a decades-long trajectory. Today, 50% of Gen Z respondents say they are often lonely, with 56% agreeing that they feel more comfortable socialising in online spaces than in the real world. In response, we see a desire for new forms of social connection and shared spaces. As we explore in our **Alone Together** trend, the hobbies and hangouts of older generations are making a comeback, from knitting to mahjong to supper clubs, given a 21st century edge with DJ sets and (NoLo) cocktails. Within this theme we also explore the rise of natural highs and the power of influencers to provide social and cultural glue.

The same profound longing for connection is fuelling increasingly complex relationships with technology. As AI accelerates at exponential speed, our **Electric Dreams** trend explores the ways in which our emotional relationship with technology is struggling to keep pace: 42% of Gen Z respondents agree that they sometimes feel that AI understands them better than their friends and family. In this space we explore the disturbing rise of intense AI-enabled relationships, the changing face of AI influencers and an anti-slop resistance powered by slow content and healthy friction.



Trad Lives, Dentsu Creative Trends 2026

In response to a world governed by algorithms and infused with AI, we see some younger generations embrace a more analog existence; or at least an analog aesthetic. Exploring this space in our **Analog Futures** trend, we see an openness to simpler, more tactile devices, a growing resistance to algorithmic sameness and a nostalgia for simpler, more hedonistic times. An ambivalent attitude to wellness culture is emerging; while sober-curious lifestyles are more prevalent, and the super-rich pursue extreme longevity, we also see the resurgence of alcopops, tanning and ‘quick-fix’ appetite suppressants. Some are planning to live forever, others are indulging like there’s no tomorrow.

This yearning for certainty and belonging also fuels our **Trad Lives** trend. We see a desire to reconnect with nature, finding solace in the soil and community in traditional rituals. Within this trend we explore the shift away from the city, the rise of hyper local and the

resurgence of religion and spirituality, as well as our increased fascination with fungi, pickles and fermentation. 52% of respondents agree that they are ‘exploring their spirituality more as life feels more uncertain’ (63% of millennials), while 64% agree that they are ‘drawn to traditional values and ways of living’. We also see a coming together of nature and technology, as younger consumers bring technical expertise to traditional family farmsteads.

Dive deeper into each of our trends, and the three sub-trends we unpack within them, as well as our perspective on what is trending, timely, timeless... and what tomorrow brings in these spaces. We explore data from consumers across the world and across generations and what it means for brands and businesses in 2026 in the full report. ☞

To find out more, download the full report, [here](#).



Welcome to the Enshittification Economy /

Author and activist Cory Doctorow takes aim at big tech and the 'raw deal' that advertisers receive from digital giants

Cory Doctorow coined the term 'enshittification' in 2023 to describe a process we could all feel – but struggled to articulate: the decline and decay of online platforms. It went viral, of course, and was named as word of the year by the American Dialect Society.

Since then, enshittification has become shorthand for the sludge clogging up the digital world and polluting the cultural discourse – much of it bankrolled by advertisers, and enabled (in Doctorow's view) by the self-interested dominance of a handful of tech firms.

The science-fiction author and digital rights activist builds on this theme in his new book *Enshittification: Why Everything Suddenly Got Worse and What To Do About It*, expanding the metaphor to pandemic proportions (welcome to

'the enshittoscene'). He maps a familiar three-stage spiral: platforms start by being good to their users, then pivot to pleasing their business customers, before finally screwing both groups over in the scramble for shareholder value.

He also names names. Elon Musk is 'stupid and incompetent'. Donald Trump embodies 'enshittification in the political realm'. And advertisers? They're suffering from Stockholm Syndrome: both victims and accomplices, 'held hostage' by big tech, but also in thrall to a defiled system that suppresses the very users it relies on.

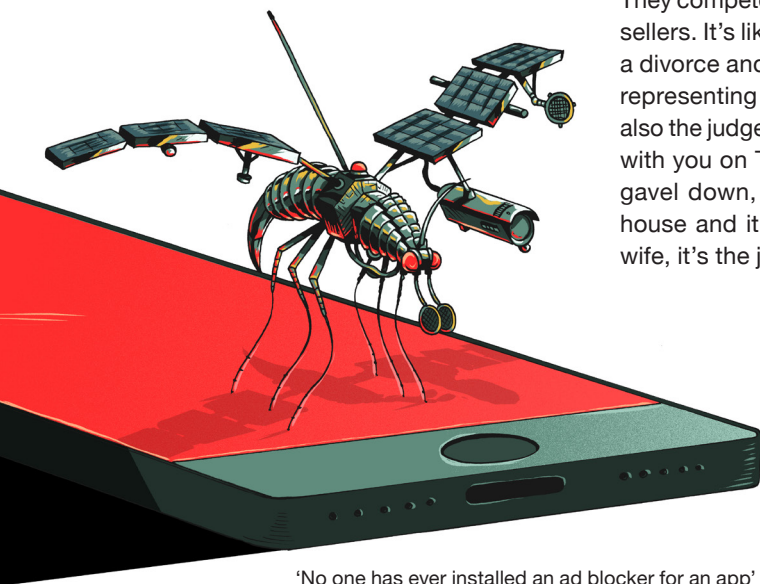
To mark the book's release, Doctorow spoke to Contagious about advertising's role in the enshittification process, why he thinks the Gen AI bubble will burst in spectacular fashion and his hopes for a 'new internet' decoupled from American tech.

What does enshittification mean for advertisers?

One way in which enshittification, as a framework for understanding tech and its problems, differs from other ideas like [Shoshana] Zuboff's surveillance capitalism is it does not think that the platforms sold out their users to be good to advertisers. It acknowledges that advertisers get a pretty raw deal from the platforms too. One of the things I discuss in the book is how in 2017 Procter & Gamble zeroed out \$100m behavioural advertising spend and saw a 0% drop in sales because it was all fraud, \$100m a year just disappearing down the fraud hole.

It's not like there's an easy way to stop ad fraud, but there are ways to make it worse, and that comes from a lack of investment in policing. It's not that they [the tech platforms] like the fraud. But if you're the only game in town, if you're too big to care, why would you bother?

ILLUSTRATION: JOE WILSON



'No one has ever installed an ad blocker for an app'

Another piece of it is the overselling of what they can do. The surveillance capitalism people did us no favours when they took at face value Mark Zuckerberg's claim that he was an evil dopamine-hacking wizard who could make anyone buy anything. That's a pitch that he makes to help his sales force sell ads. But it doesn't mean that he's good at it, and it doesn't mean that he's telling the truth.

How have the tech platforms behaved towards advertisers?

The historic take of intermediaries – media buyers, agencies, everyone who isn't the publisher – was 15% of the money in the ad market. But Google and Meta take 51%, and that's coming out of everyone else's end.

And we know how they do it. They have a demand side platform, they have a buy side platform, they have a marketplace. They've locked it so that you have to use all three. They compete with buyers, they compete with sellers. It's like you and your wife going to get a divorce and finding that the same lawyer is representing both of you, and that person is also the judge, and they're also trying to match with you on Tinder, and when they bang the gavel down, they've decided who gets the house and it's not the husband, it's not the wife, it's the judge.

'If Elon Musk popped his clogs, there'd be 10 big bulls wrestling for succession and the winner would be indistinguishable from him'

Cory Doctorow

But do you have any time at all for the surveillance capitalism argument that advertisers are complicit in all this, and that they're happy with the results that they achieve with targeted advertising on these platforms?

Advertisers are like the person who says that they want the best brandy, but will settle for beer. If you offer them all the surveillance data in the world, they will convince themselves that they can make use of it. And they will ask for more and more, for the same reason fentanyl users keep taking more and more – because it stops working. Stimulus regresses to the mean and that is a reckless, irresponsible thing to do, but they do it because the platforms offer it to them.

One of the theses in *Enshittification* is that the expansion of IP law has made it impossible for users to develop and make use of interoperable technologies that improve their experience. If you're on a web browser, it's an open platform, and you can install an ad blocker, and 51% of web users have done so. It's the largest consumer boycott in history.

But, when it comes to apps, because laws

around the world ban reverse engineering anything that is called a technical protection measure, no one has ever installed an ad blocker for an app. This is one of the reasons that companies really want you to not use their website and start using their app, because it's skinned in enough IP to make it a felony to block ads while you use it, and means that the user is completely defenceless.

What about the big personalities in tech? You're not afraid to call out Musk and Zuckerberg but argue that if it wasn't those people enshittifying everything, there would be others.

These people are horrible but if Elon Musk popped his clogs, there'd be 10 big bulls wrestling for succession and the winner would be indistinguishable from him. If there's a Musk-shaped hole in our society, created by lax anti-trust, the failure to enforce or create privacy laws, bans on interoperability, and weak labour protections for tech workers who want to do right by their users, it doesn't matter who's sitting in the driver's seat. Their imperative is to yank the enshittification lever every day.

What do you make of the Gen AI platforms, ChatGPT and the rest, does AI offer an opportunity here for a less enshittified digital world?

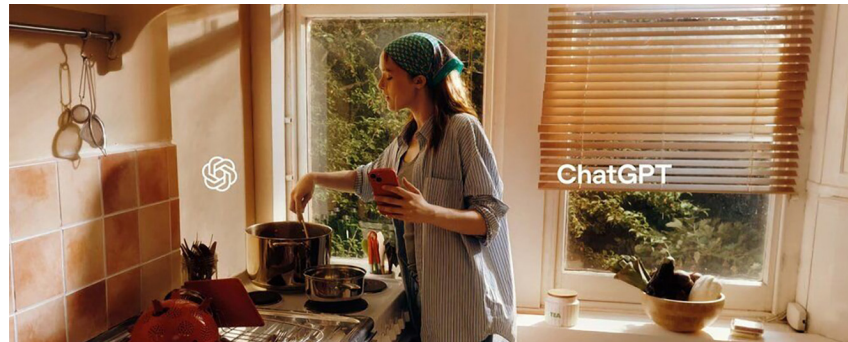
The problem with AI is that it's just a bubble. Not only is it a bubble but it's such a terrible bubble, the unit economics of AI are so poor that there's a very good chance the number of foundation models will revert to zero after the bubble. The open source models will be there forever, and there's so much room for optimisation, and it's going to get a lot easier to optimise.

But they [AI businesses] put \$700bn into capex [capital expenditure on assets such as data centres]... It's insane. By their own account, this industry that has laid out \$700bn is bringing in \$45bn a year gross. And it's only \$45bn because \$10bn of that is Microsoft giving \$10bn in credits to OpenAI and then OpenAI giving it back to Microsoft. That's like Starbucks giving you a gift certificate for a latte, you redeeming it, and then booking it as revenue. Except it's \$10bn.

So, the industry has got very terrible unit economics. Every round of this technology has been more expensive. Every user they add costs them more. Their assets are being sweated so heavily that they're burning out at the rate of knots, and they are only keeping the lights on by burning hundreds of billions of dollars in other people's money. And anything that can't go on for ever has to eventually stop, and they just don't have a future.

You write about potential cures to enshittification. What role can advertisers play here?

If you wanted to be an advertiser on the right side of history you would start looking at



AI isn't just a bubble... it's a terrible bubble – every user added, costs ChatGPT more

context ads, behavioural ads. Nobody wants a surveillance ad, but first party ads, context ads that we run our own exchange for, there's no surveillance there. The user doesn't have to consent because you're not sharing their data.

Advertisers say, 'Oh, I want to only advertise to 18- to 34-year-old man babies who've been Googling about gonorrhoea and own an Xbox. How will I ever sell anything if I can't do that?' But be the one who leads the pack, because GDPR [the EU's General Data Protection Regulation] enforcement is about to get real.

What do you make of the rise of influencers and creators? Because there's ad industry research saying there's a lot of trust in these people when they recommend brands and products.

They get a very rough deal. From the perspective of someone doing a media buy for an influencer, the influencer might not know how much of their audience is organic. If their stuff is just being non-consensually crammed into someone's eyeballs to make the pitch that TikTok's a great place to go and be a sports

bro or a fortune teller, then you can't know whether you're making a good buy either.

But due to the Digital Markets Act [EU law enforced since March 2024] there's going to be a lot more transparency into those algorithms and how those things are selected. If you look at Bluesky, if users have more control over their algorithms and can actually choose them, then yes, you're going to have fewer opportunities to inorganically engage an audience. But on the other hand, you will know that all your engagement is organic, and that none of it is ad fraud by another name.

You write about hope for 'a good new internet' due to stronger anti-trust laws encouraging competition, and tighter regulations. But do you see Trump as some sort of 'enshittifier-in-chief' trying to derail this?

I had some hope for the US, but it's gone now. Trump has made it really clear that anti-trust is just a way to extort bribes. He will have the FTC [Federal Trade Commission] block a merger, but only until you give him some money, or lots of favours.

We need to build European equivalents [of US-owned big tech]. Especially now that Trump is making it very clear that he views all the rest of the countries in the world as competitors and not allies, and that he will use big tech to do geopolitics against public officials abroad.

But they're going to run against a problem. Because, while it does take a lot of work to build a functional clone of Google Docs or Microsoft Office, that's not the hard part. The hard part is getting the data out of the American silos and into a Euro stack. No one's going to copy and paste a million documents out of a government ministry, one at a time. And the American tech giants are not going to help you get your data out.

How hopeful are you that positive change is achievable?

People are reconsidering whether they want to let America decide how they're going to run their technology, and 'hope' is the right word there. I don't have much time for optimism. I think of optimism as a species of fatalism, to believe things are going to get better no matter what we do. We can make things worse; we can make things better. I don't think things get worse or better on their own.

Hope is the idea that even if you can't plot a course from where you're sitting now, that goes all the way from A to Z, you can still find a way to go up the gradient just a little towards the world you want. So, as long as you've got to move, there's always room for hope. And the move we've got in front of us now, with decoupling the rest of the internet from America's enshittynet, is one of the most powerful that I've seen in my 24 years as a digital rights activist. ❧



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their marketing by learning from the world's
most impactful brands, campaigns and trends.

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