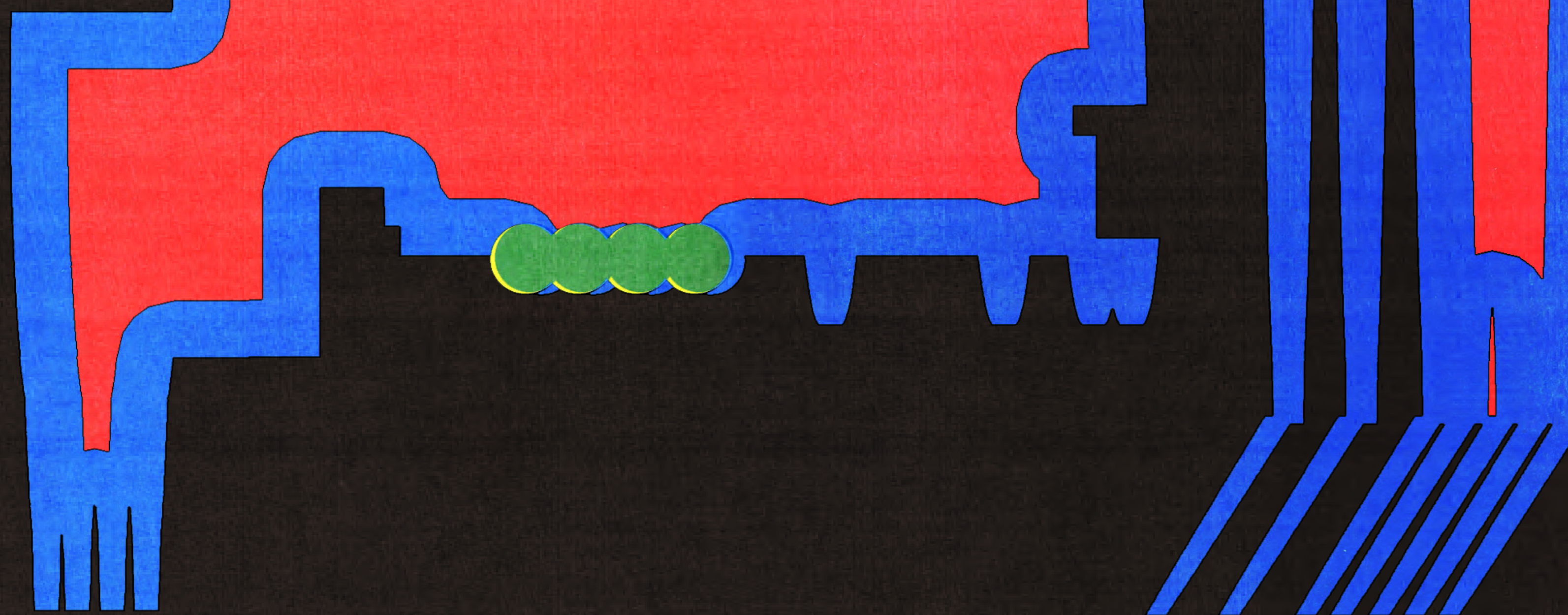


# TRENDS FORECAST '24



INTRODUCTION

As fragmented as our geography—  
or even our social media algorithms  
—leads us to feel, we're not alone.  
We're far from it.



As we look back on 2023, our first thoughts about the past year aren't necessarily about the latest in technology, business, and culture. Instead, they're about the overwhelming sense of a divided world.

But, at the same time, we all feel the same desire for global well-being. As fragmented as our geography—or even our social media algorithms—leads us to feel, we're not alone. We're far from it.

The world remains more connected than ever. And we have digital to thank for that.

In 2024, we predict that digital will give voice to the global consciousness, which revels in shared experiences that transcend demographics, online niches, and personal stances.

For example, we all saw how #Barbenheimer, the surprise internet phenomenon that delighted audiences around the world, brought millions of people together for this summer's unconventional blockbuster double feature.

With upcoming events like the Paris Olympics and the US & UK elections providing global stages for discontent, it will be through this ability to connect us—and to help us acknowledge our differences—that digital will continue to be the driving force helping us move the world forward.

Furthermore, Gen Z will provide an additional layer of accountability as cultural watchdogs and tech-savvy digital natives in the discussion that ensues. Ensuring that the global consciousness upholds values like authenticity, relatability, and accountability. Ultimately guiding us all to a more intersectional, equitable, sustainable society.

For brands and businesses, evolution will be the name of the game. Staying ahead of the competition will require not only embracing the exciting change AI has offered within technology and society but also course-correcting as each undergoes that transformation.

For now, join us as we dive into the key trends defining what's to come and pioneering this interconnected, culture-driven digital age.

## 1 IN OUR AI ERA

- 1.1 Generative AI's evolution
- 1.2 Transparency with AI in the short term pays off in the long term
- 1.3 AI is the key to your Friday off
- 1.4 Offsetting AI is just as important as offsetting commutes
- 1.5 AI becomes privacy's unlikely defender

## 3 WITH TECH AND DATA, THE FUTURE IS NOW

- 3.1 Spatial computing gets good. Really good.
- 3.2 Web3 is not dead, but...
- 3.3 Gamers are here for new-age tech (and open to marketing)
- 3.4 Social media goes freemium
- 3.5 Every company is a data company so... what's next?
- 3.6 Offshore, nearshore, friendshore, reshore

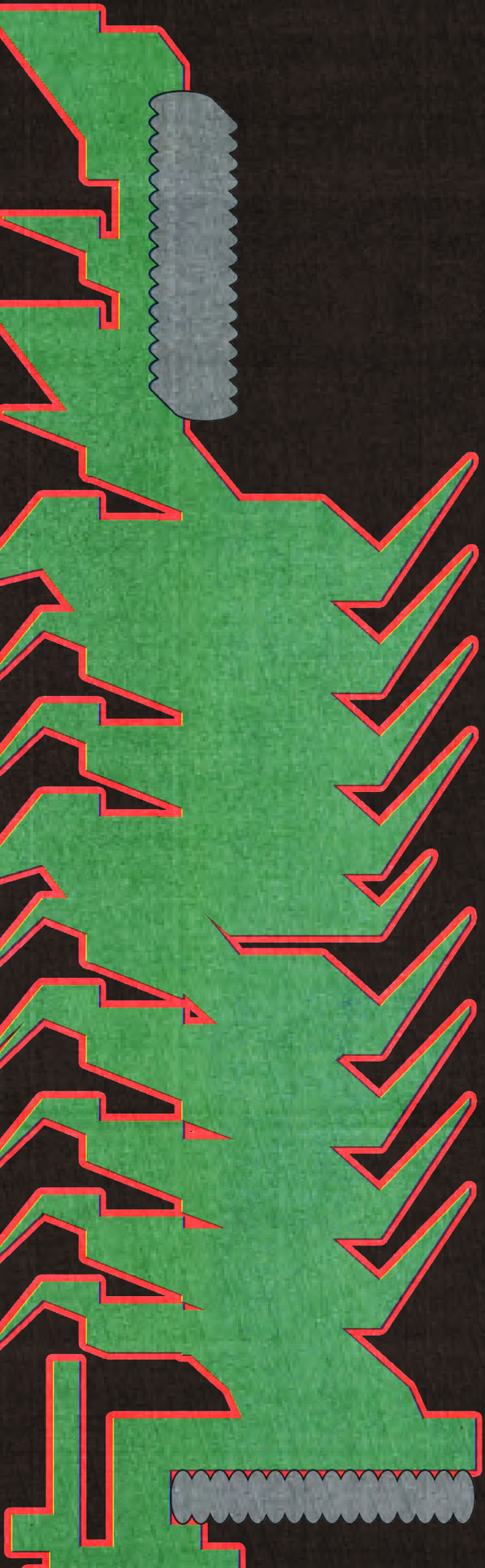
## 2 MARKETING GETS PERSONAL— THIS TIME, FOR REAL

- 2.1 Meet conversational commerce
- 2.2 Welcome to the conceptual web era
- 2.3 Gen Z is more nuanced than you think
- 2.4 Searchers no longer give a cl\*ck

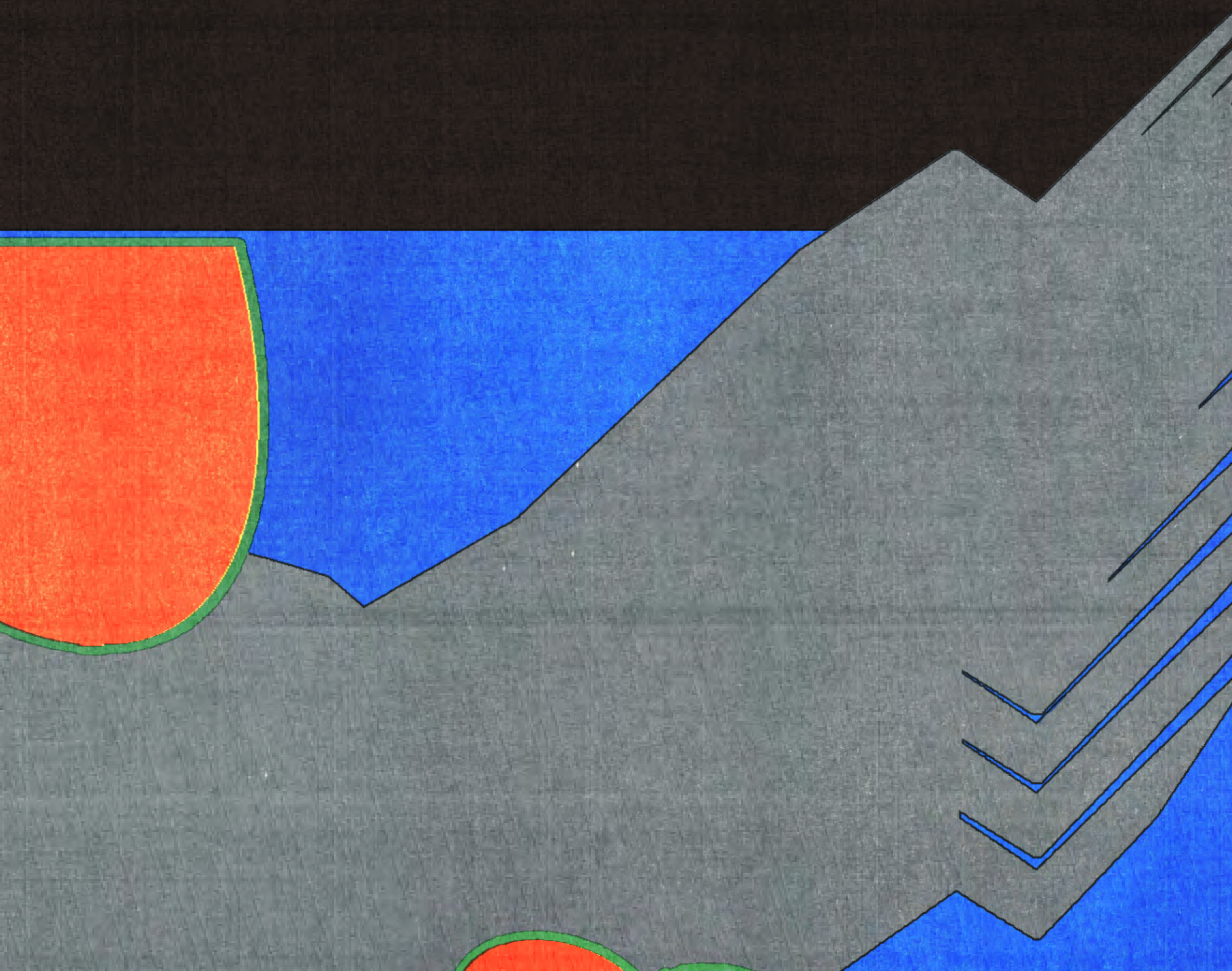
## 4 PEOPLE AND THE PLANET

- 4.1 Good design is accessible design. Full stop.
- 4.2 Brand safety gets turned upside down
- 4.3 A new chapter in mobility is more about the journey than the destination
- 4.4 Mitigating impact with the power of innovation

## 5 LOOKING AHEAD



# 1 IN OUR AI ERA

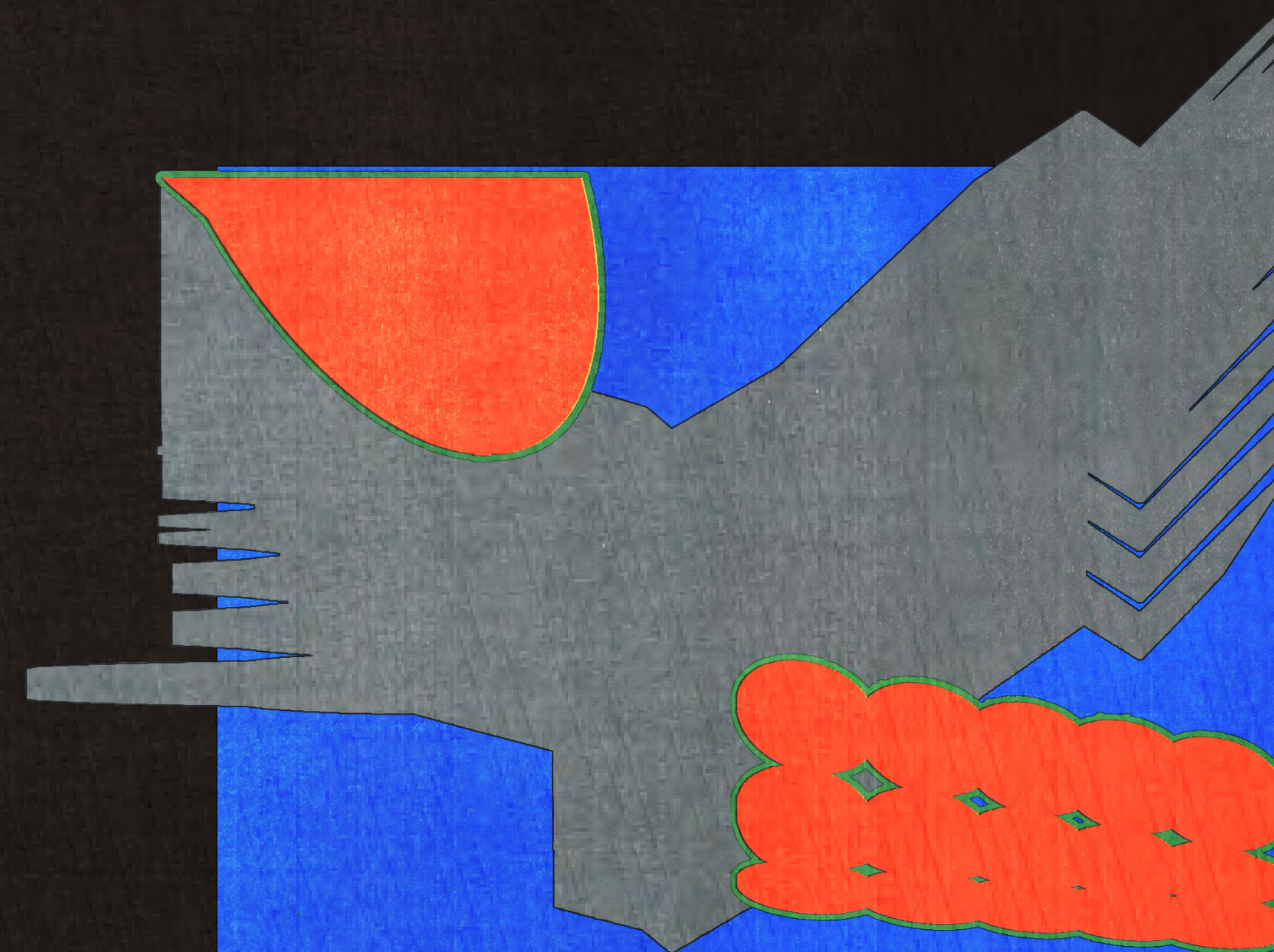


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There's no doubt that the meteoric rise of AI has been one of the most disruptive events of 2023. Between the evolution of generative AI tools released just last year—like Midjourney, DALL-E, and ChatGPT—and the development of new ones, the bar for AI's capabilities within everything from immersive art to content creation just keeps getting higher and higher.

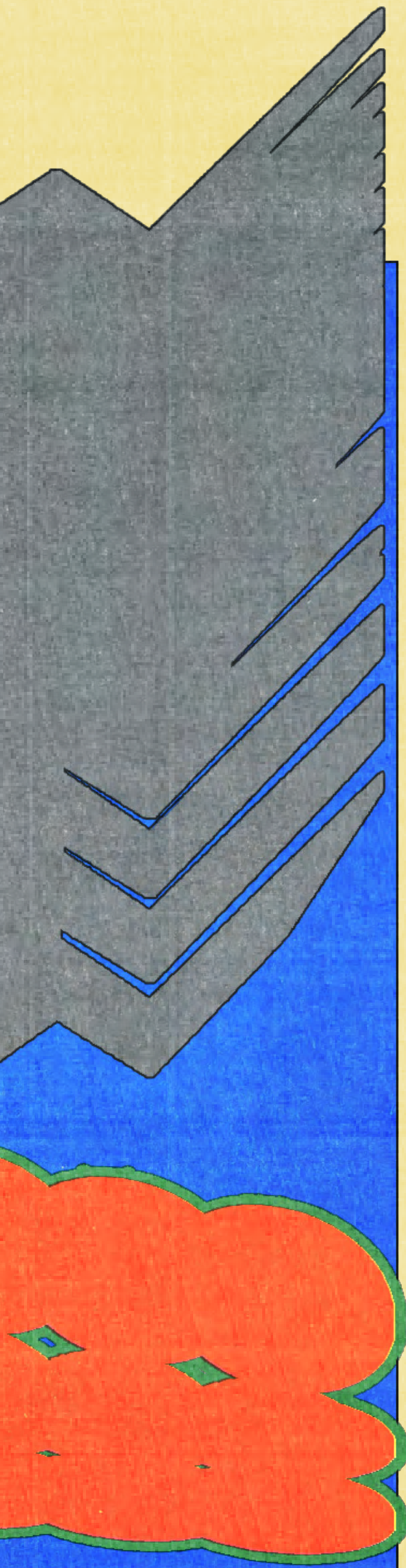
At the same time, opinions on AI remain divided and plenty of consumers feel uncertain about the technology's potential impacts on society. We've observed this in the global call for the regulation of AI, underscored during the Hollywood writer's strike and in the proposal for the European Union's AI Act.

Over the next year, we'll see AI start to change minds as its evolution gravitates toward both more responsible and more democratized applications. Innovations will improve transparency around the technology, integration in businesses will demonstrate its potential for productivity and personalization, and increased adoption will lead to AI becoming a hero for humans in the digital age.



# 1.1

# GENERATIVE AI'S EVOLUTION





## The democratization of generative AI (GenAI) creation tools means we'll soon see a new arena for competition and creativity to thrive.

There's no doubt about it: The world is preparing for the most exciting and innovative year in technology ever, thanks to the possibilities of GenAI.

While machine learning and artificial intelligence have been advancing since the 1950s, the steep strides that GenAI has taken since Google's conception of the [transformer model](#) in 2017 are unlike anything society has ever experienced. Today, we see new iterations of large language models (LLMs) like OpenAI's ChatGPT released several times per month.

In 2023, the world saw GenAI become widely accepted as an increasing number of digital users leaned on large language models to create everything from text and images to audio, video, and code. Nearly [80% of McKinsey survey respondents](#) claim they've used GenAI in or outside of work by using tools like ChatGPT, Midjourney, or Stable AI. The technology's rapid integration into everything from business operations to our individual lives means the race for the next big breakthrough is underway.

From startups to the major GenAI players, tech firms are diligently charging forward to define the next frontier of LLMs' capabilities. And, according to [The Economist](#), three critical constraints will help to level (and likely shake up) the playing field: computing costs, the insatiable demand for data, and money.



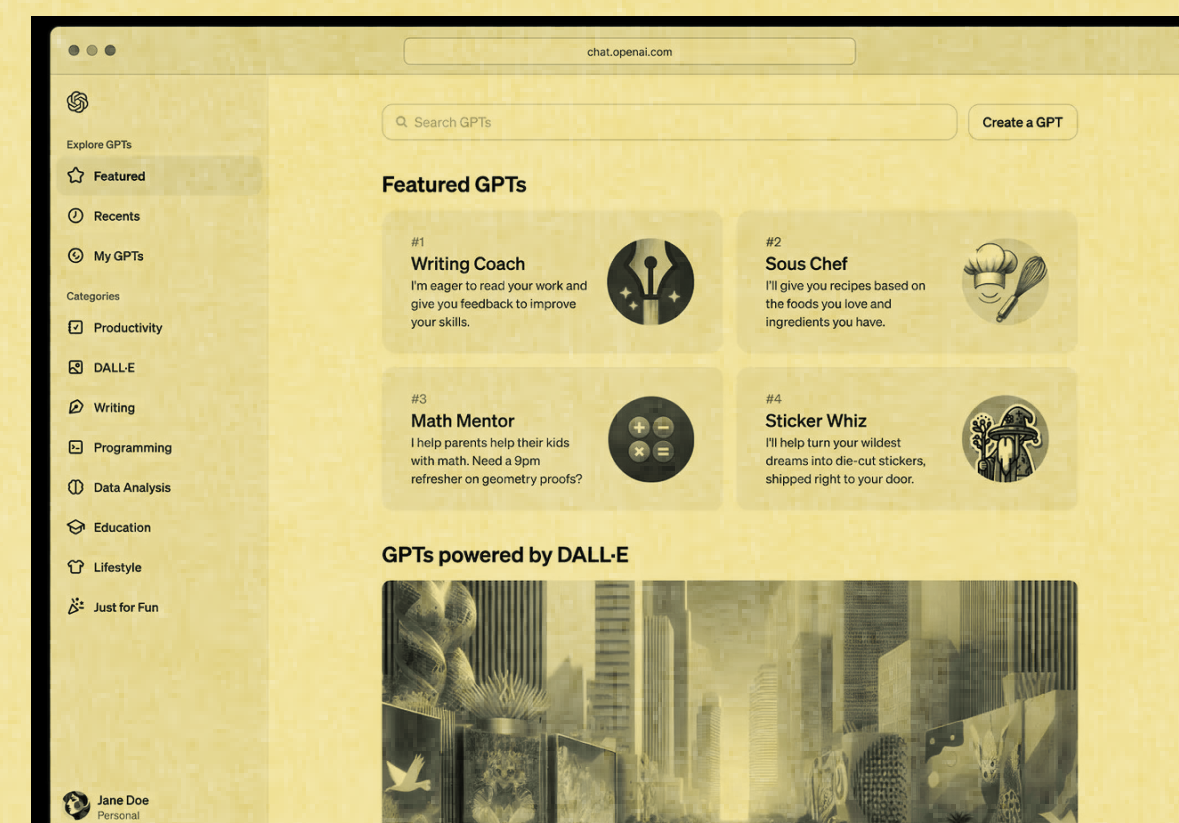
[Top](#): OpenAI launched "GPTs", the custom versions of ChatGPT that combine instructions, extra knowledge, and any combination of skills.

[Left](#): Generative art from "The state of AI in 2023: Generative AI's breakout year"

For the AI pioneers, the ability to entice and retain users with their tools will be crucial to succeed in the fight for GenAI dominance.

Left: DEPT® AI service, launched 2023

Right: OpenAI's GPT store



The tools from AI hyperscalers—like Microsoft, NVIDIA, and OpenAI—will continue to get smarter, more accurate and up-to-date, able to understand increasingly long and nuanced instructions, more collaborative, and generally even more human-like.

We can also expect to see an explosion of niched-down applications and tools that address specific industries and use cases, where many argue GenAI's true value lies.

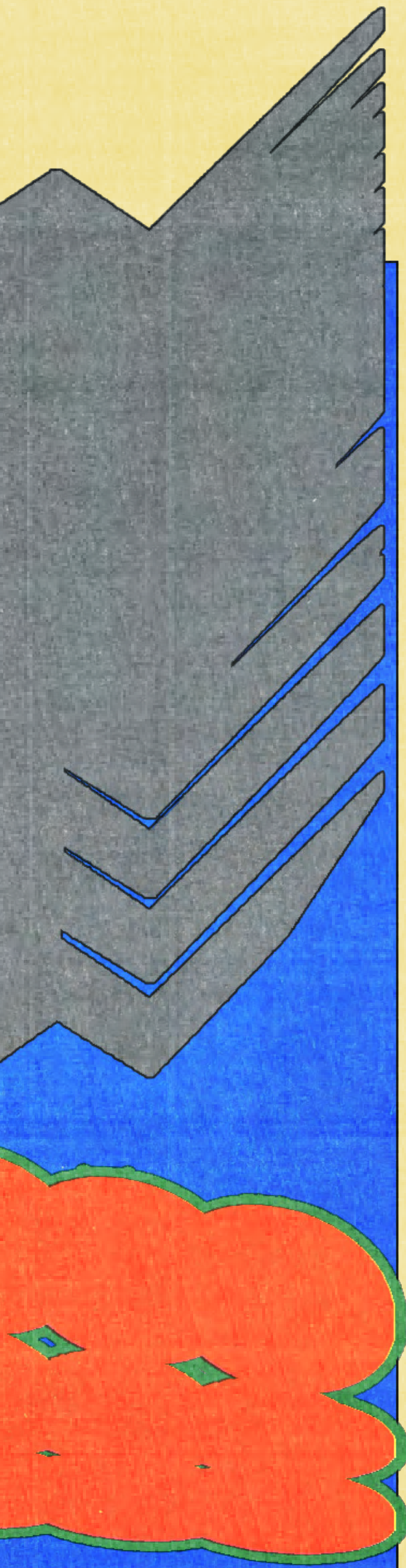
As these costly, supercharged models are being developed, we'll also observe the simultaneous democratization of GenAI creation tools. Platforms like Meta's open-source LLM to OpenAI's GPTs and GPT Store already make it possible for anyone—from individual programmers to startup developers to large organizations—to build, share, and monetize applications in a fraction of the time it would take to build from scratch. Similarly, agencies like DEPT® are also building AI tools and solutions like custom pre-trained models to help brands accelerate their adoption of AI. Altogether, innovations such as these will be imperative for a new arena for competition and creativity to thrive.

For the AI pioneers, the ability to entice and retain users with their tools will be crucial to succeed in the fight for GenAI dominance.



# 1.2

# TRANSPARENCY WITH AI IN THE SHORT TERM PAYS OFF IN THE LONG TERM



Since GenAI's arrival and widespread adoption in the public sphere, it's been expanding the possibilities of what humans can create. Everyone—from natural creatives to folks less artistically gifted—now has the tools to generate incredible images, enchanting audio, and captivating content.

It hasn't taken long for GenAI to affect the way we create and consume content online, from TikTok feeds to branded blogs.

In general, people are willing, even eager, to engage with the fascinating, informative, futuristic outputs of AI—some even paying up to \$9.99 just to participate in the viral AI '90s yearbook trend.

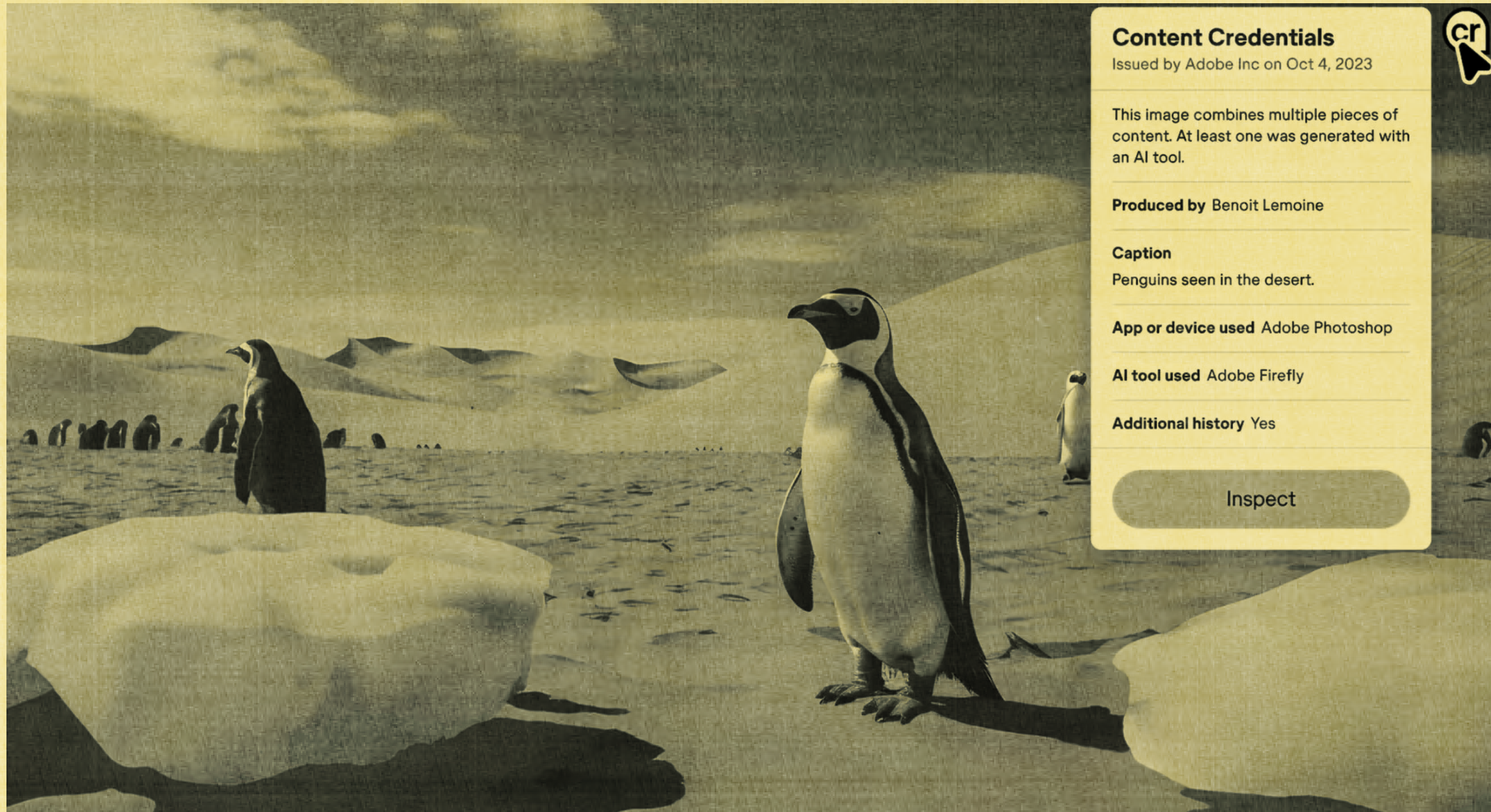
Of course, digitally altered media is nothing new. From Photoshop to CGI to autotune, we've long had tools capable of everything from subtly tweaking to completely fabricating content. However, the increasing usage of AI in content creation has sparked a greater discussion around digital authenticity and conscious consumption and evaluation of media.

In a time when nearly anyone can use digital tools to create nearly anything, transparency is more critical and top of mind than ever. 78% of consumers think it should be required to clearly label digital content created with AI. And, with more than half of people saying they can't distinguish between human- and AI-generated text or images, a label seems to be a fair ask.

Right: The original viral image (left) and another AI-generated fake from the same batch (right). [via Reddit / u/trippy\\_art\\_special](#)



Brands that take the initiative to prioritize honesty around when and how they use GenAI will go far in gaining—and retaining—the trust of their audience.



It's going to take time for governments to grapple with how to handle laws and regulations around AI-generated content. But brands that take the initiative to prioritize honesty around when and how they use GenAI, in processes or creative output, will go far in gaining—and retaining—the trust of their audience, stakeholders, and partners. Even more, they'll also help to set the standards for safe and ethical AI usage.

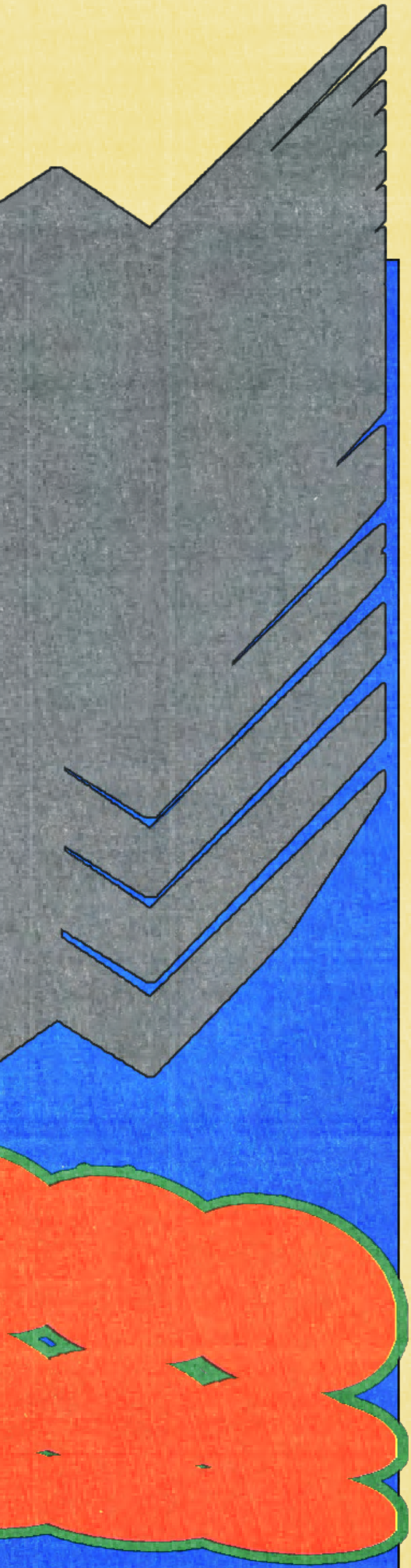
One development to help provide this transparency is the emergence of metadata labels or watermarks for AI-generated content.

For example, Adobe's [Content Credentials](#) is a watermark that reveals a menu of information, like a nutrition label, including who made the image and which AI tools were used. Other major players like [Instagram](#) and [Google](#) are also developing indelible AI watermarks to help detect AI-generated content and protect against its potentially harmful uses, such as deep fakes.

In 2024, we'll see a shift in the way AI-generated content is published and perceived as it becomes more prevalent and less easy to detect. Brands and agencies that adopt a culture and a method for disclosing their use of AI will be able to meet consumer or client demand early in the game, earning a unique opportunity to be leaders in our shifting digital landscape.

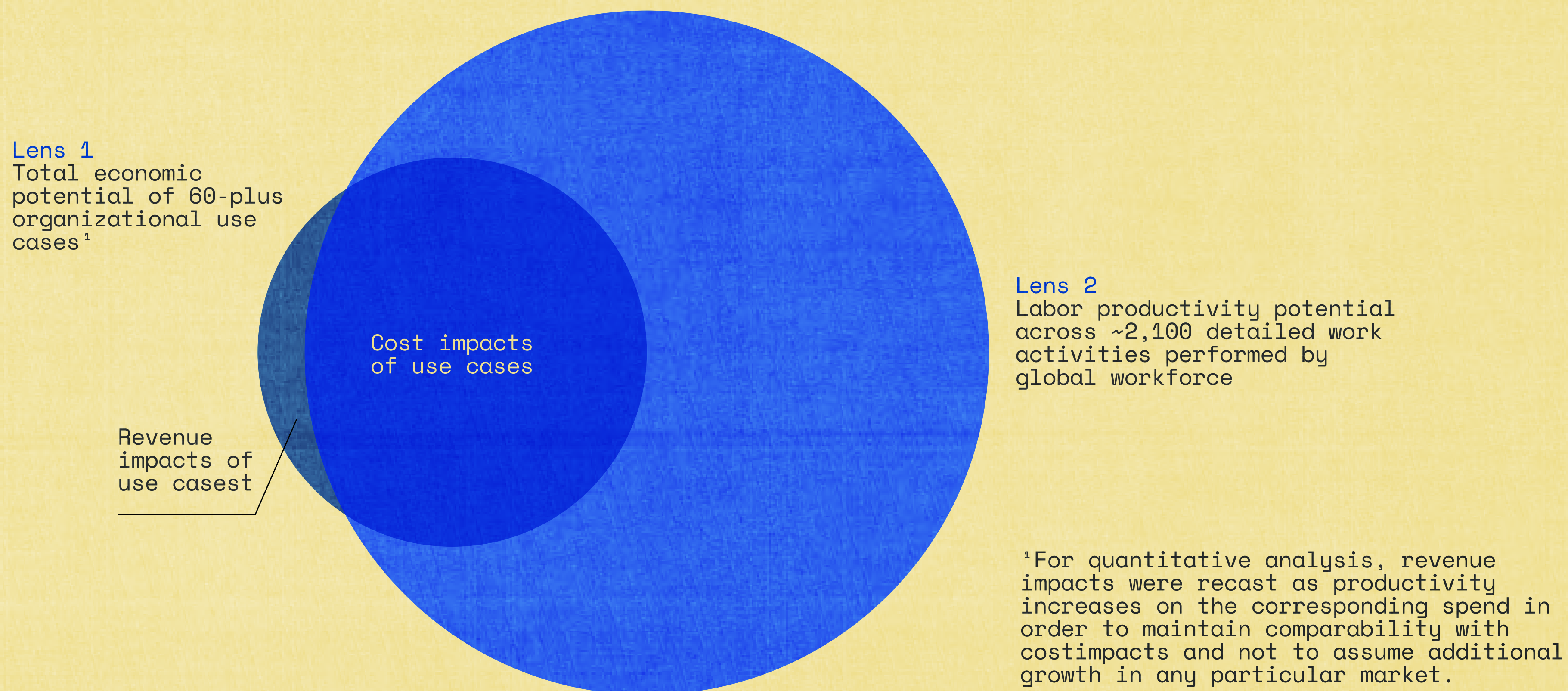
# 1.3

# AI IS THE KEY TO YOUR FRIDAY OFF



# AI's ability to automate tasks won't take jobs away from employees, it'll help them get more done in fewer hours.

The potential impact of generative AI can be evaluated through two lenses.



The global workplace continues to be in a state of disruption. According to Gallup's [2023 State of the Global Workplace](#) report, the majority of employees—six out of every ten around the world—are quiet quitting. Combined, quiet quitters and “actively disengaged” employees cost the global economy \$8.8 trillion, or 9% of global GDP.

The need for sweeping change in the workplace is clear: employers need a strategy for reducing burnout and improving employee well-being, or global GDP will continue to suffer. But how can businesses reconcile these needs while still being productive enough to hit their bottom lines?

One of the most-talked-about strategies for change remains the four-day workweek. The [world's largest trial of a shortened week](#), which comprised 61 companies and 2,900 employees in the UK, found overwhelming success with employees and employers, with 71% of employees reporting reduced burnout and 92% of the companies moving to continue with the new model.

However, the four-day workweek isn't a one-size-fits-all approach. Not every industry can implement a shortened week without impacting their performance and, in 2016, Sweden found that although reducing work hours benefitted some smaller companies, [bigger businesses faced higher expenses](#).

Left: The potential impact of generative AI can be evaluated through two lenses. From McKinsey & Company

Enter an unlikely hero for employees—AI.

With little to no regulation from workplaces, institutions, and governments during its meteoric rise, AI has been perceived as a looming threat for many professions. But AI's ability to automate tasks won't take jobs away from employees, instead, it'll help them get more done in fewer hours.

In March, [Goldman Sachs](#) estimated that GenAI could raise global GDP by 7% and reported that “although the impact of AI on the labor market is likely to be significant, most jobs and industries are only partially exposed to automation and are thus more likely to be complemented rather than substituted by AI.”

AI's potential within marketing teams offers a prime example of how automation can complement human roles. Thanks to AI-powered [creative automation](#), for example, marketers are now able to create assets at scale in hours instead of days or weeks, apply changes to thousands of deliverables simultaneously, and deliver personalized emails across markets and languages.

As a result, 69% of marketing teams say that GenAI tools save them two to three hours of work a week—with 36% saying they're saving as many as four to five hours.

With that many hours saved, AI's ability to boost employee efficiency has the power to improve the work-life balance by legitimizing the four-day workweek for many industries.

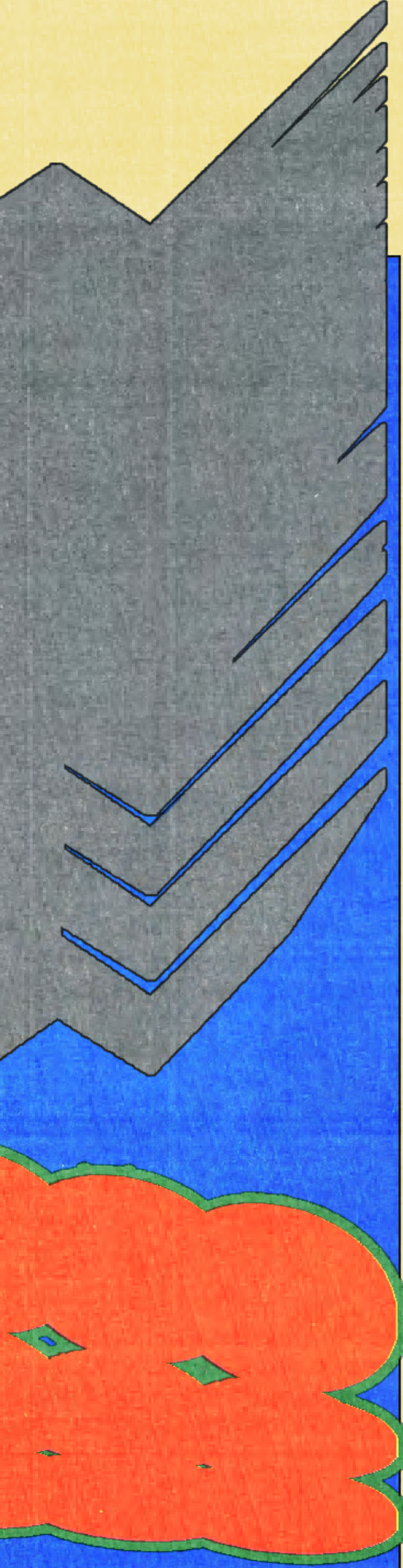
It could even change the way people think about productivity as a whole. As our own Isabel Perry said during a panel at [Adweek New York](#), thanks to AI, “we are about to enter the most productive era of human history ever.”



# 69%

[Source](#)

of marketing teams say  
GenAI tools save them 2  
to 3 hours of work a week



1.4

OFFSETTING AI IS  
JUST AS IMPORTANT  
AS OFFSETTING  
COMMUTES

Researchers estimated that Microsoft may have consumed 700,000 liters of drinkable water to power the servers for training GPT-3, enough to produce 370 BMW vehicles.

Bottom: Water consumption "Making AI Less 'Thirsty': Uncovering and Addressing the Secret Water Footprint of AI Models"

Running GPT-3 inference for 10-50 queries consumes 500 ml of water.

## ChatGPT

☀️  
Examples

"Explain quantum computing in simple terms" →

"Got any creative ideas for a 10 year old's birthday?" →

"How do I make an HTTP request in Javascript?" →

⚡  
Capabilities

Remembers what user said earlier in the conversation

Allows user to provide follow-up corrections

Trained to decline inappropriate requests

⚠️  
Limitations

May occasionally generate incorrect information

May occasionally produce harmful instructions or biased content

Limited knowledge of world and events after 2021

In April of 2023, new research emerged indicating that Microsoft may have consumed 700,000 liters of drinkable water to power the servers for training GPT-3—enough to produce 370 BMW vehicles.

The study, shared on Cornell University's arXiv, is yet to be peer-reviewed but its findings remain significant.

In the arXiv study, "direct consumption" refers to the water usage of the servers that store the massive data sets and algorithms that AI learning models run on. These servers are usually housed in large data centers, which rely on water for cooling purposes.

When it comes to the sustainability of these data centers, as Forbes pointed out, the problem is that there's a trade-off between water efficiency and carbon efficiency: renewable energy sources like solar power can conversely lead to poorer water efficiency.

It's also important to note that excessive water consumption isn't a problem specific to AI—all cloud services and data centers, regardless of their specific function, contribute to water usage. For example, a small 1 MW data center using traditional cooling can consume around 25.5 million liters of water per year.



Right: Image source from “A sustainable solution helped a small town cool its data center”

The environmental footprint of the technology sector has been a longstanding problem. As far back as 2016, the UN Environment Programme stated that water use must be “decoupled” from economic growth to preserve global water security.

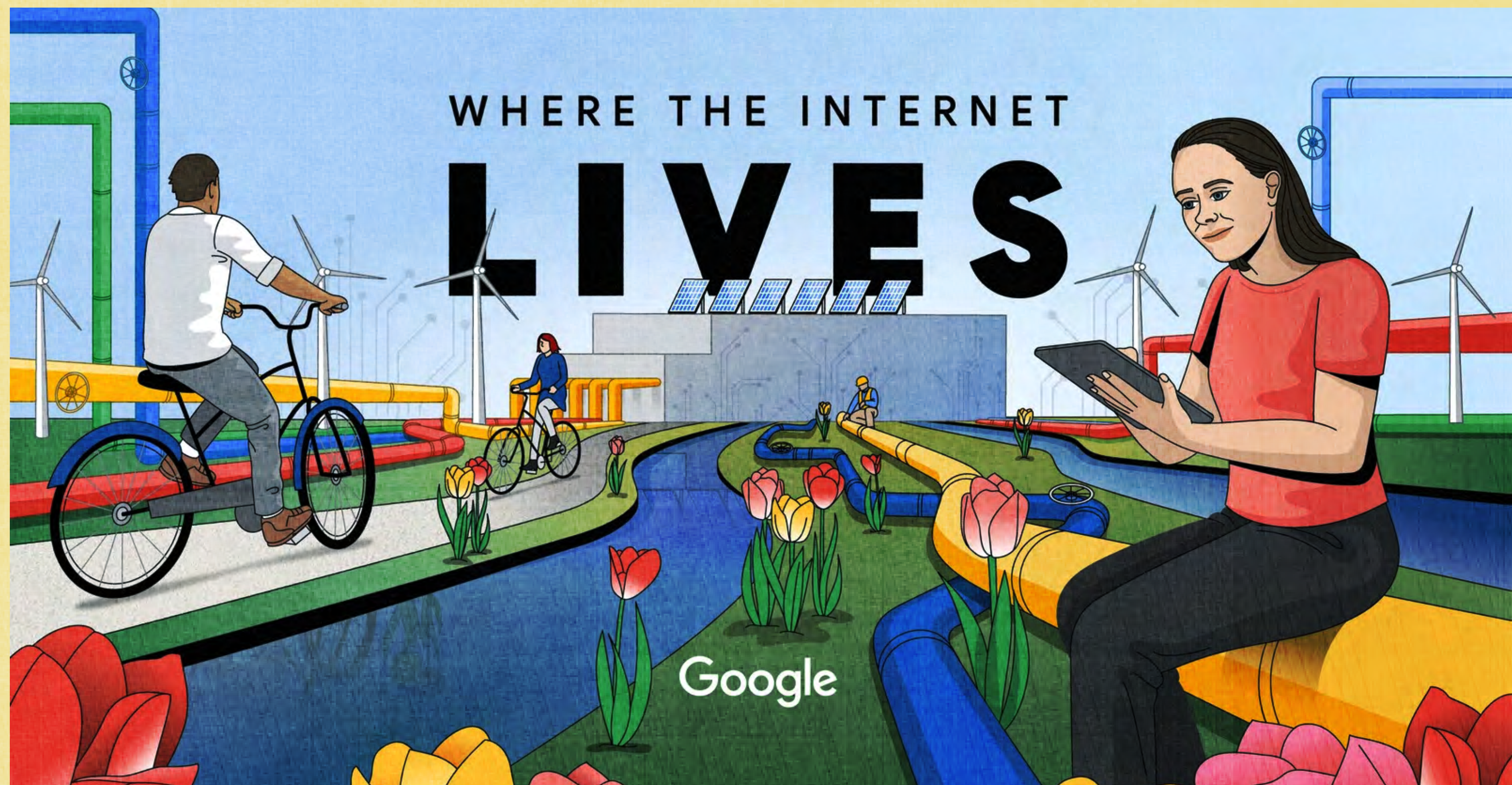
In this way, it’s become just as important for businesses to take responsibility for their water consumption as it is for their carbon emissions.

Curbing the water consumption of data centers is the first step to taking that responsibility. Gartner recommends a strategy for businesses that prioritizes efficiency: using energy-efficient hardware, running servers for training models only as long as necessary, and considering the necessity of AI as a solution before implementing it.

Businesses can also look to service providers that use data centers responsibly as well. In the Netherlands, for example, Google partnered with the community surrounding its data center in Eemshaven to use industrial canal water as a coolant, reserving potable water for other uses.

As AI continues to evolve, more water-efficient solutions will also emerge for businesses. Innovations like composite AI use learning models that work for a range of solutions, enabling businesses to reduce their impact by sparing them the water and energy consumption required to train multiple, highly specified models.

While it’s impossible (at least in the short-term) to fully quench AI’s thirst, businesses can—and should—begin to apply techniques like these to mitigate the technology’s water consumption and improve its sustainability in the meantime.



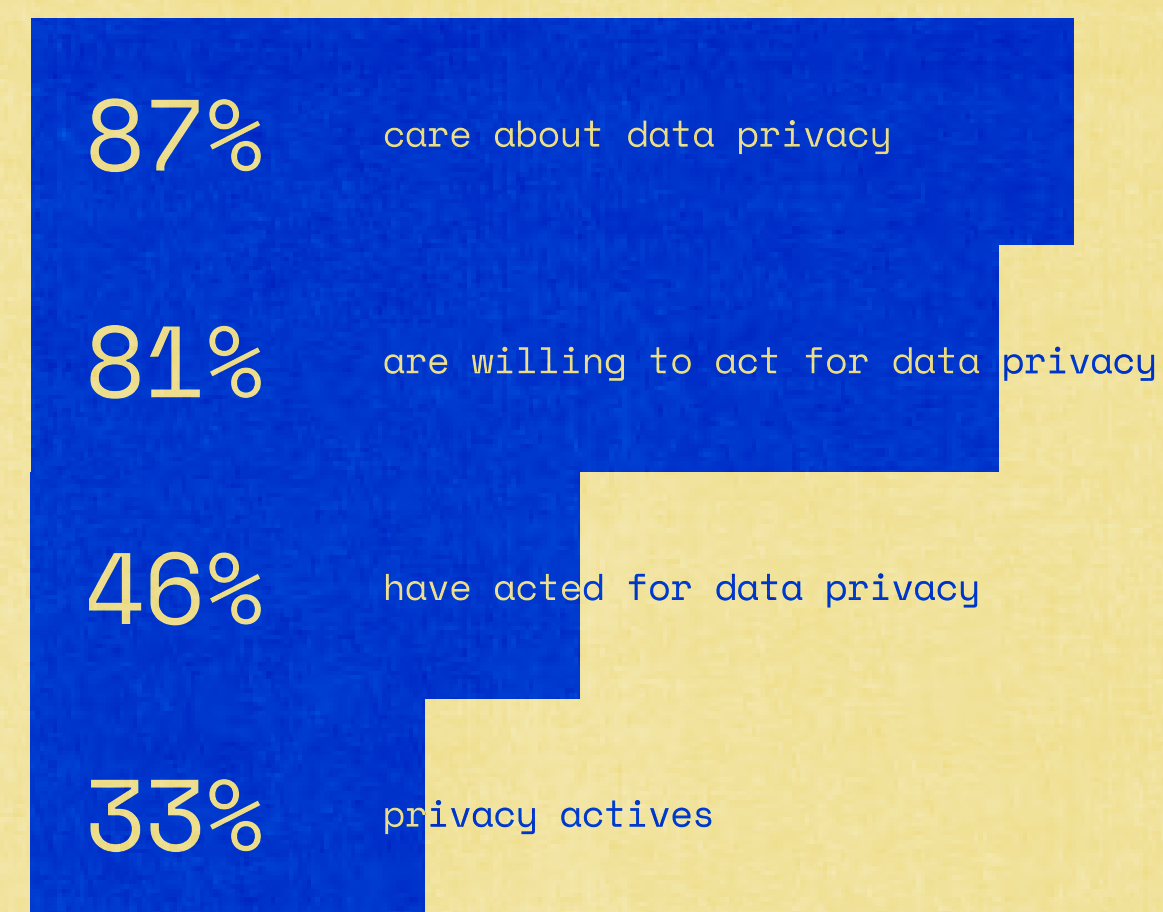


# 1.5

# AI BECOMES PRIVACY'S UNLIKELY DEFENDER



Although AI does threaten privacy, it also happens to be the best weapon for defending it.



Source

There are many different POVs when it comes to AI but, across the board, everyone—including the technology's greatest optimists—has some concerns about it.

In a recent survey, Cisco found that 87% of consumers care about data privacy and that, while the majority supported the use of AI, 62% of consumers were concerned about how organizations are using their data for AI today.

Although AI does threaten privacy, it also happens to be the best weapon for defending it. As McKinsey noted, traditional means are no match for countering the adverse effects of technology with AI's power, size, and scale—the best solution for addressing these is AI itself.

Left: The AI-generated image "The Electrician" from Boris Eldagsen's series Pseudomnesia

Left: "Setting the stage for a responsible AI framework" from McKinsey

Right: E.U. Takes a Step Closer to Passing the World's Most Comprehensive AI Regulation

< Back to Generative AI

## Responsible AI (RAI) Principles

### Setting the stage for a responsible AI framework

We believe Artificial Intelligence (AI) has the power to transform business and are committed to helping our clients and our people harness that potential with clear principles and ethical guardrails for the responsible use of AI. The pace of change for ourselves and our clients has never been faster and we will continuously update these principles to support world-leading responsible and inclusive AI advancements. We encourage all organizations to establish clear principles for the responsible use of AI and commit to adhering to the following guiding principles:

#### 1. Accurate & reliable

Develop AI systems to achieve industry-leading levels of accuracy and reliability, ensuring outputs are trustworthy and dependable.

#### 2. Accountable & transparent

Establish clear oversight by individuals over the full AI lifecycle, providing transparency into development and use of AI systems and how decisions are made.

The screenshot shows the top portion of a TIME magazine article. At the top left is the TIME logo and a 'SUBSCRIBE' button. Below the header is an advertisement for 'Change starts with you' featuring several Polaroid photos and a 'Donate' button. The article title is 'E.U. Takes a Step Closer to Passing the World's Most Comprehensive AI Regulation' under the category 'TECH • LAW'. The main image of the article shows a large assembly of people, likely the European Parliament, sitting at desks with nameplates and raising their hands in a vote.

As a privacy protector, AI can encrypt personal data, reduce human error, and detect conditions that indicate a potential cybersecurity incident. Brands and businesses using learning models that rely on consumer data can also embed privacy protection into the framework of their AI.

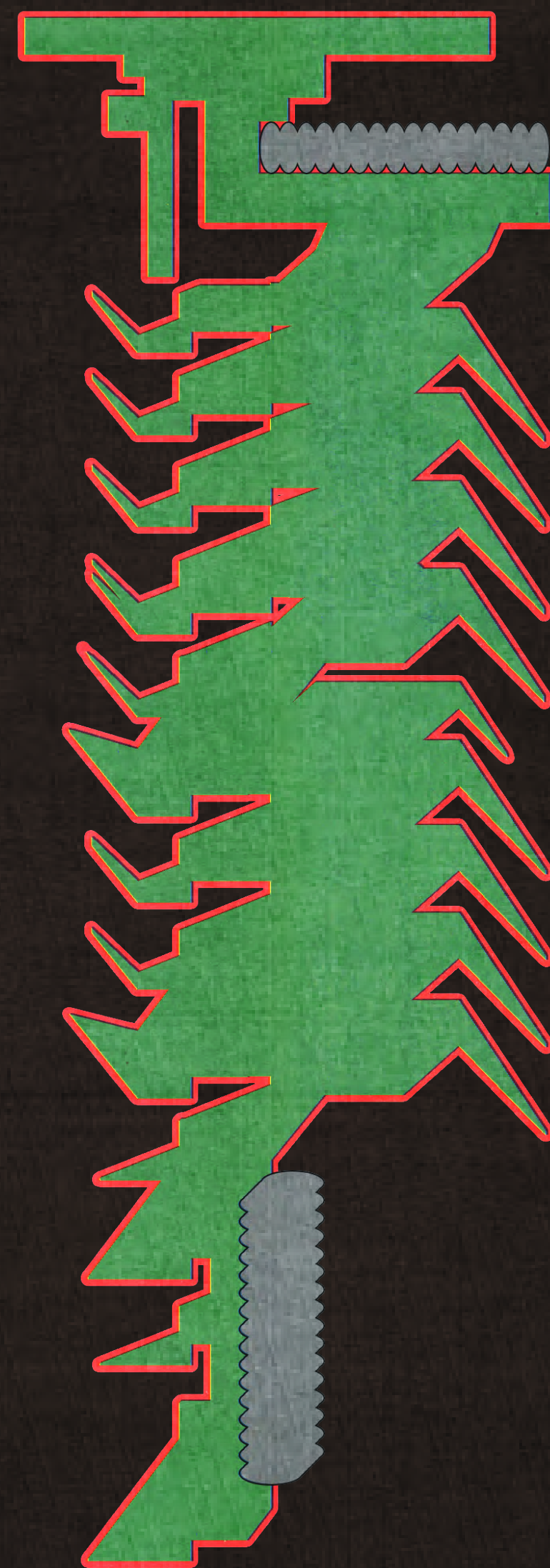
One such framework is decentralized AI, which distributes data and learning models across a network of devices as opposed to storing them on a single server. This system opens the door to practices like federated learning and homomorphic encryption, which enable the AI to train its models while keeping data private and secure.

Going forward, a combination of existing data privacy laws along with forthcoming AI-specific regulations, like the proposal for the EU AI Act, will help assuage consumers' concerns about privacy and AI. As more regulatory bodies take action in the coming decade, a standard for what constitutes ethical and responsible AI design will emerge.

Until then, it's not just up to businesses and technologists to prioritize privacy and security. It's their responsibility to use the tools and frameworks already available to them, like decentralized AI, to ensure user data and information is protected.

# 2 MARKETING GETS PERSONAL—THIS TIME, FOR REAL

- 2.1 Meet conversational commerce
- 2.2 Welcome to the conceptual web era
- 2.3 Gen Z is more nuanced than you think
- 2.4 Searchers no longer give a cl\*ck



Today's consumers don't just want personalization—according to McKinsey, 71% of consumers expect personalization in their brand interactions. Moreover, 76% become frustrated when brands fail to deliver on that expectation.

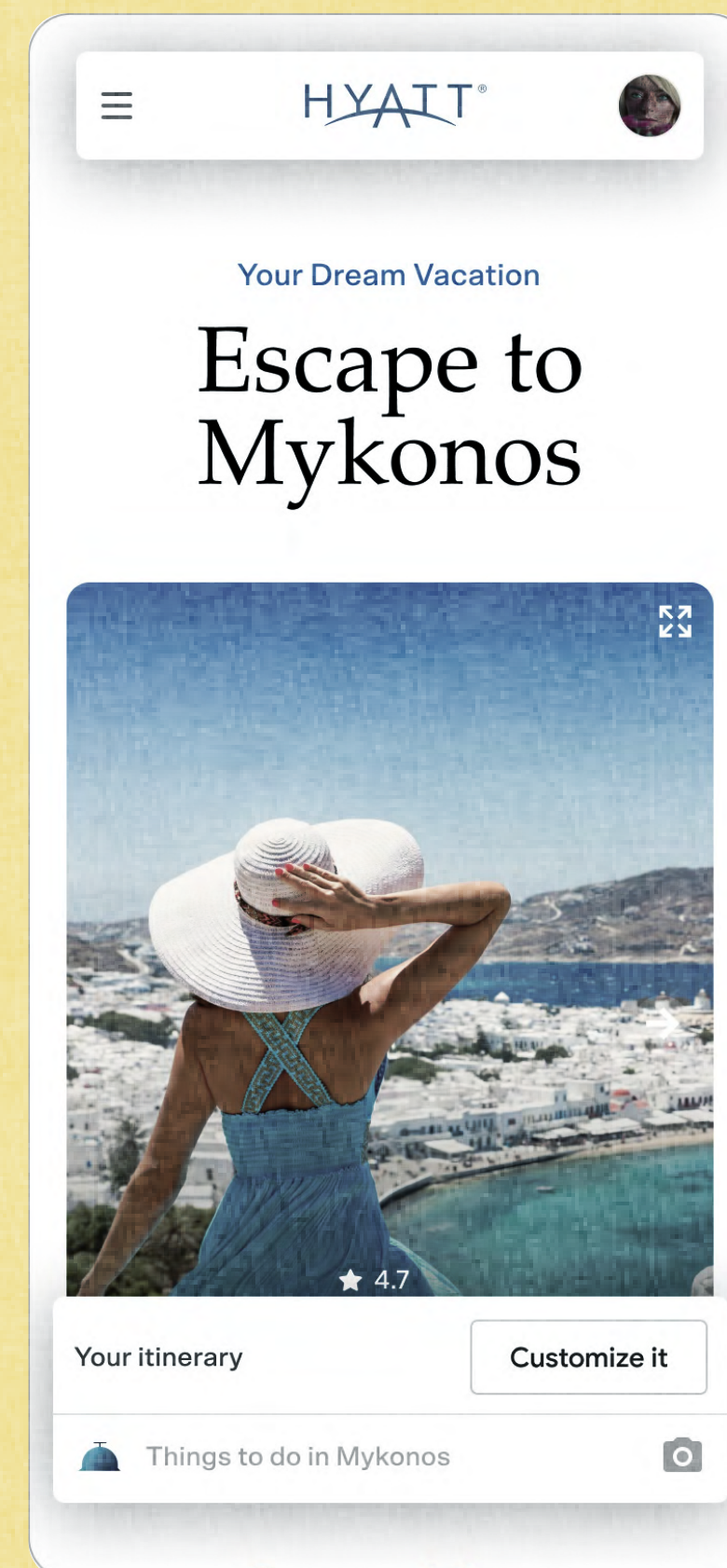
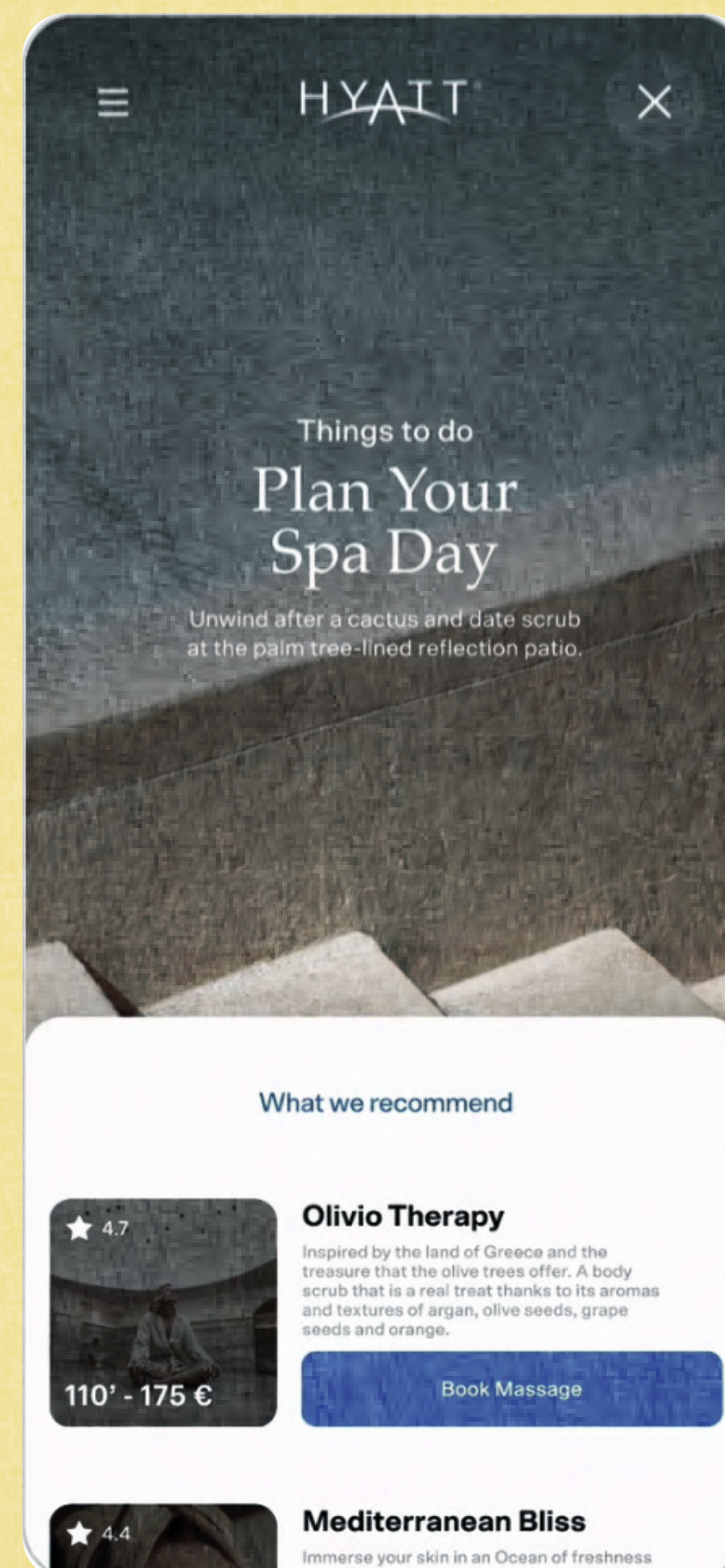
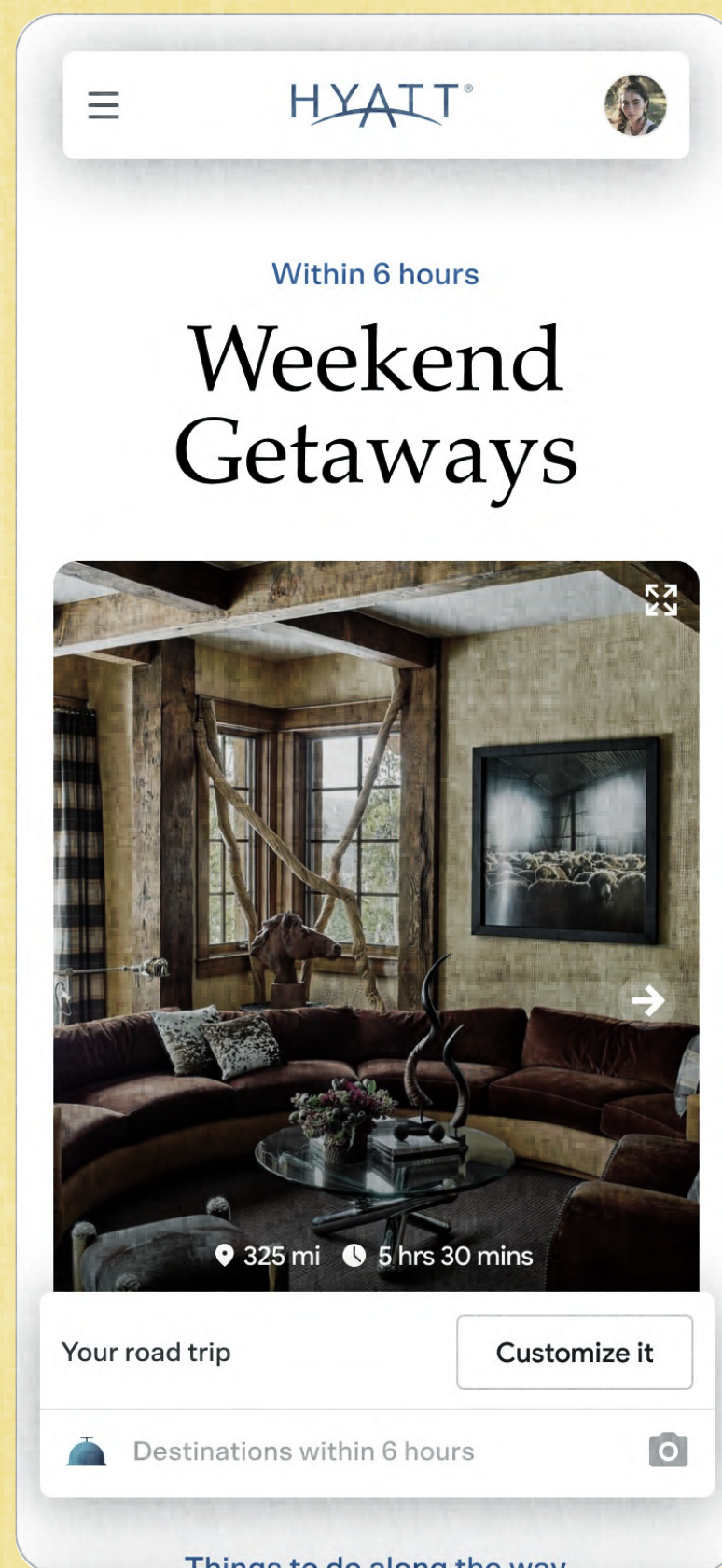
We know that making stronger connections with your customers leads to loyalty. But, historically, “personalization” has been an empty buzzword for a strategy with no real methodology or infrastructure behind it.

With innovations like GenAI and machine learning, however, personalization is getting real. Marketers now have the tools they need to create meaningful experiences catered to each visitor. Consequently, 2024 will represent a pivotal year for marketing: as old playbooks change, marketers will need to adapt and follow the trajectory of Gen Z's preferences as they pioneer what's next.

# 2.1 MEET CONVERSATIONAL COMMERCE



With powerful new AI and ML tools at brands' disposal, the next big evolution in personalization for e-commerce is conversational commerce, a natural progression of guided shopping experiences.



Left: An example of AI-powered personalization within the customer experience.

Within the past five years, a renewed focus on personalization has emerged within e-commerce brands through guided shopping experiences.

Countless brands now offer chatbots, for instance, to help direct customers to products that fit their needs. Other innovative tools, like [True Fit](#), have helped fashion brands offer customers personalized size recommendations.

Additionally, many e-commerce brands have built powerful, value-driven reputations by launching quiz platforms that create lists of personalized recommendations for customers based on their responses.

Now, with powerful new AI and ML tools at brands' disposal, the next big evolution in personalization for e-commerce is conversational commerce.

In many ways, conversational commerce is a natural progression of guided shopping, a trend that's already proven its value in this arena. The basic idea is to use tools like chatbots, voice assistants, and messaging apps—which are already on the cutting edge with AI capability—to engage with audiences in real-time.

Conversational commerce fits into the customer journey against the backdrop of another trend: discovery-based search.





Just like personalization, search is also evolving. When Gen Z needs to find information, like product reviews or a how-to guide, they go to TikTok. According to [The New York Times](#):

“More and more young people are using TikTok’s powerful algorithm — which personalizes the videos shown to them based on their interactions with content — to find information uncannily catered to their tastes.”

Gen Z has developed a preference for information that’s tailored to their individual needs and delivered in a more organic, human way than what ye olde Google offers.

And it’s not just young people either. Consumers of all ages browse through pages of content while on the hunt for more detailed information about a product before purchasing it—even searching for information on a product across multiple platforms, from asking Google for comparable options to searching YouTube for in-depth reviews.

Conversational commerce provides consumers with a tool that enables them to access all of that information—in a way that’s personalized to them and their needs—directly on an e-commerce brand’s site.

Moreover, for brands, conversational commerce creates a deeper, more meaningful way for consumers to discover their products that apply AI in a way that feels more approachable and human.

# 2.2 WELCOME TO THE CONCEPTUAL WEB ERA




It's not just about generating content; it's about unlocking forms of expression and knowledge, where the full spectrum of human experience can be integrated with the power of computing.

## Generative AI Stack

### APPLICATIONS THAT LEVERAGE LLMs AND OTHER FMs

 Amazon Q
  Amazon Q in Amazon QuickSight
  Amazon Q in Amazon Connect
  Amazon CodeWhisperer

### TOOLS TO BUILD WITH LLMs AND OTHER FMs

 **Amazon Bedrock**  
 Guardrails | Agents | Customization Capabilities

### INFRASTRUCTURE FOR FM TRAINING & INFERENCE

 GPUs
  Trainium
  Inferentia
  SageMaker  
 UltraClusters
  EFA
  EC2 Capacity Blocks
  Nitro
  Neuron



Left: Image from "Welcome to a New Era of Building in the Cloud with Generative AI on AWS"

The digital world is on the cusp of a transformative era, and at the heart of this revolution is generative AI.

Generative AI isn't just about mimicking human interaction; it's about performing complex tasks that traditionally demanded multiple models, extensive training, and numerous examples. This begs the question: Can brands harness the power of GenAI to develop systems that comprehend and interact with digital content?

The answer lies in the emergence of what we're calling the conceptual web.

Historically, we've categorized data into two types: structured and unstructured. Structured data, which includes financial records, inventory data, and employee information, has been the backbone of computer-based understanding for over a century. In contrast, unstructured data, comprising elements like Shakespeare's works, audio recordings of the moon landing, and iconic imagery like the "Abbey Road" album cover, has largely been overlooked or forced into structured formats for computational interpretation.

However, this "ignored" unstructured data carries a wealth of information and structure. Human communication, spanning tens of thousands of years, has effectively conveyed ideas through language, writing, and images. Until now, the complexity of these structures was beyond the comprehension of computers.

This is where generative AI and large language models come into play, fundamentally altering the landscape. These technologies enable us to process, understand, and extract concepts from varied forms of human expression.

Many industry experts have been focusing on the generative capabilities of AI, but it's more than just generating content. It's about unlocking forms of expression and knowledge where the full spectrum of human experience can be integrated with the power of computing. This is the essence of the conceptual web – a revolutionary approach that aims to make ideas more accessible, searchable, and understandable at scale.

As we stand at the threshold of this new era, the conceptual web promises to redefine our interaction with the digital world, making it more intuitive, inclusive, and insightful.



# 2.3 GEN Z IS MORE NUANCED THAN YOU THINK

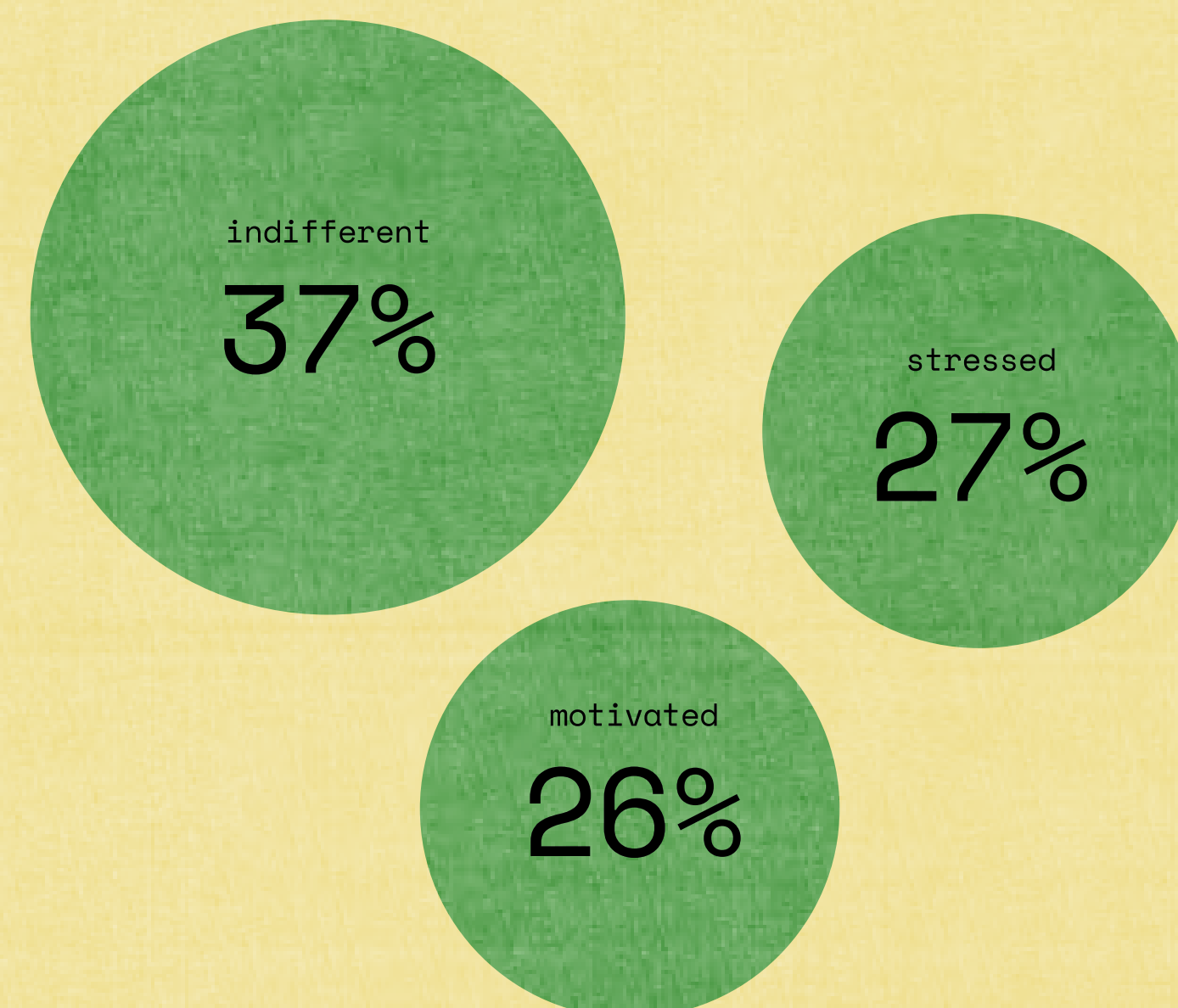


For brands to succeed with Gen Z, they have to deliver on the promise of personalized content that reflects this generation's definition of authenticity.

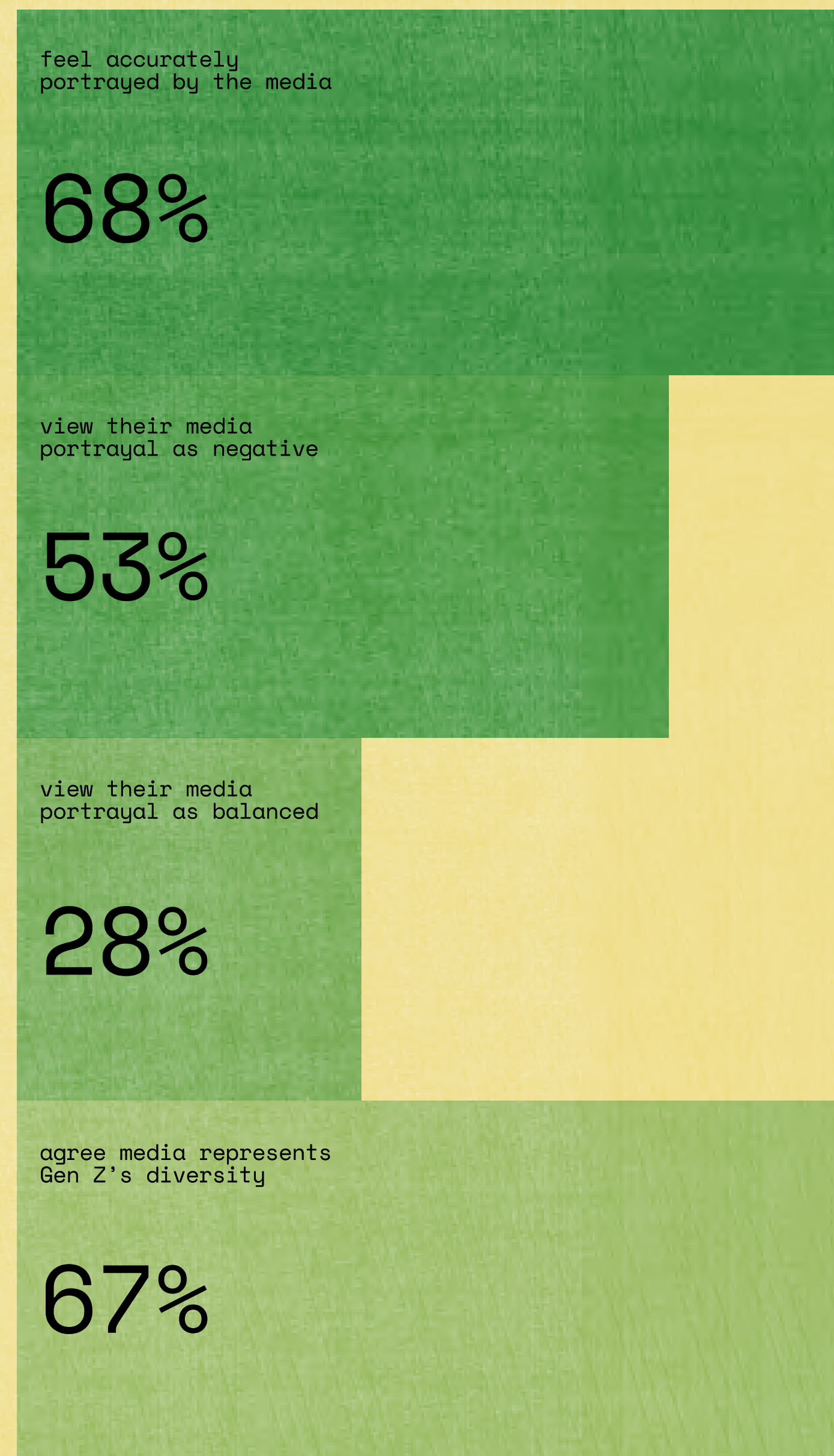
In 2024, brands will need to continue their push to connect with the unique Gen Z audience on the platforms they prefer—TikTok, Instagram, and Snapchat—and make sure they are taking into account just how nuanced and authentic this generation is.

To help inform marketers' Gen Z strategies, we decided to go straight to the source. We asked nearly 3,000 members of this one-of-a-kind generation how they feel about their portrayal in the media, what it means to be labeled as the generation that will "save the world," how they approach interactions with brands, and what their social media habits look like.

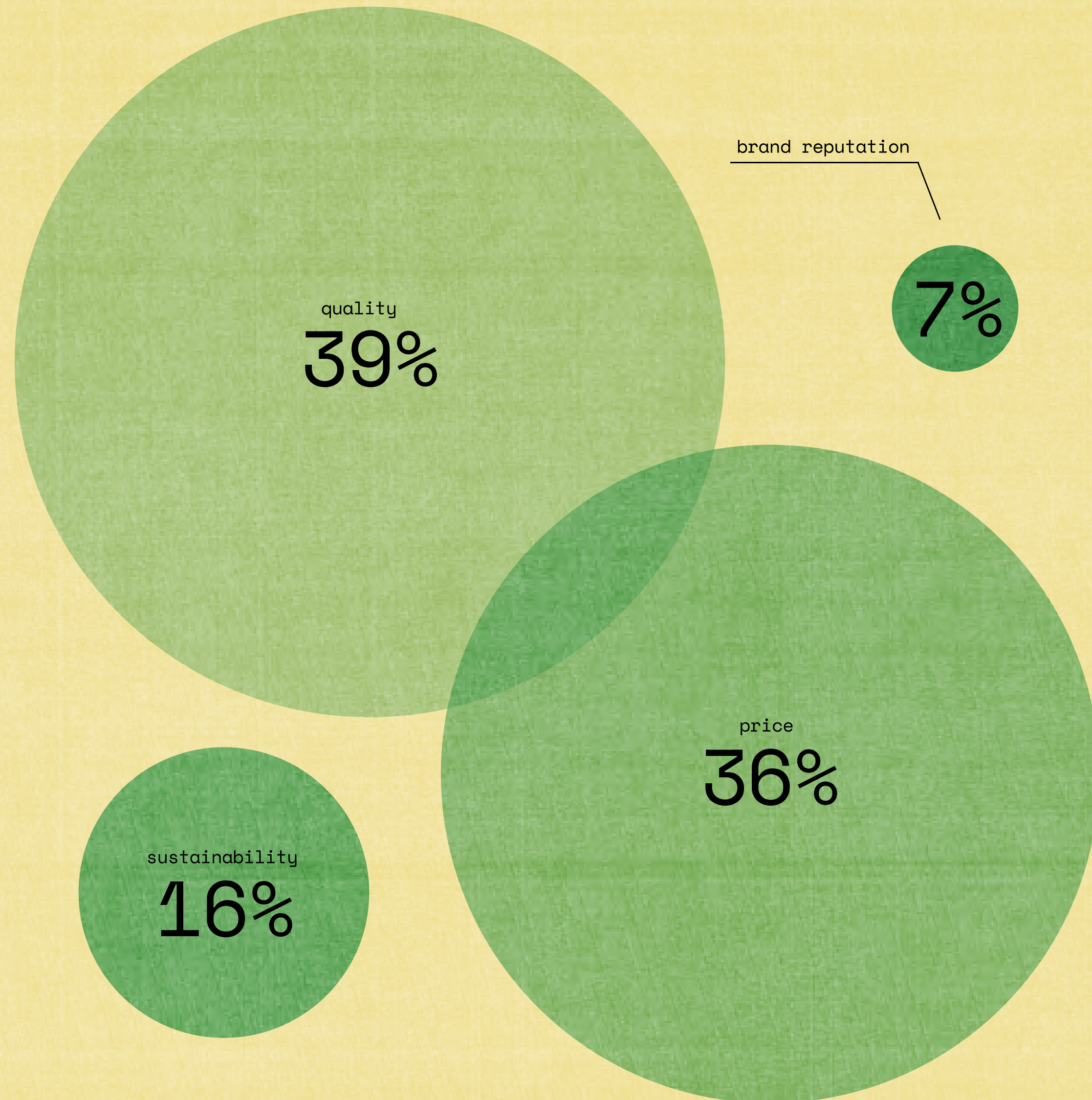
We found that:



Feelings regarding Gen Z's perceived roles in mitigating climate change



Feelings towards media portrayal of Gen Z



Maybe none of this data is surprising to you—or maybe it is. What stands out to us is the fact that nothing about Gen Z is cut and dry.

For instance, let's consider the fact that quality and price were more important to Gen Z than carbon footprint and brand reputation.

Just three years ago, [McKinsey found](#) that consumers expressed a greater willingness to pay more for sustainable goods. But—thanks to loads of inflation, cost of living increases, and an uncertain economy—today's consumers, especially younger ones, are now singing a different tune. Across generations, one consumer study from a UK-based research firm found that [53% of Gen Z and Millennial respondents](#) would prioritize purchasing affordable items over sustainable alternatives.

While it's essential to maintain a strong commitment to producing eco-friendly and sustainable products, brands must also ensure that these offerings remain accessible and affordable for the budget-conscious lifestyle of young consumers.

We can also take a closer look at how, according to our survey results, the type of advertising that resonates most with Gen Z is content from creators and influencers, a brand's social media, and personalized ads on social media platforms.

Although it's clear that these platforms are where Gen Z is willing to interact with and build relationships with brands, having an active social media presence isn't enough. Gen Z has cultivated a reputation for transparency, open conversations, and relatability. Instead of a carefully curated [highlight reel](#), this generation's social media content serves as a glimpse into their interests, offering an unfiltered and somewhat chaotic stream of thoughts.

For brands to succeed with Gen Z, they have to deliver on the promise of personalized content that reflects this generation's definition of authenticity. Leveraging social media and creator and/or influencer partnerships can be effective strategies for connecting with Gen Z, who often turn to these platforms for information, recommendations, and validation.

# 2.4 SEARCHERS NO LONGER GIVE A CL\*CK





why do whales like to sing

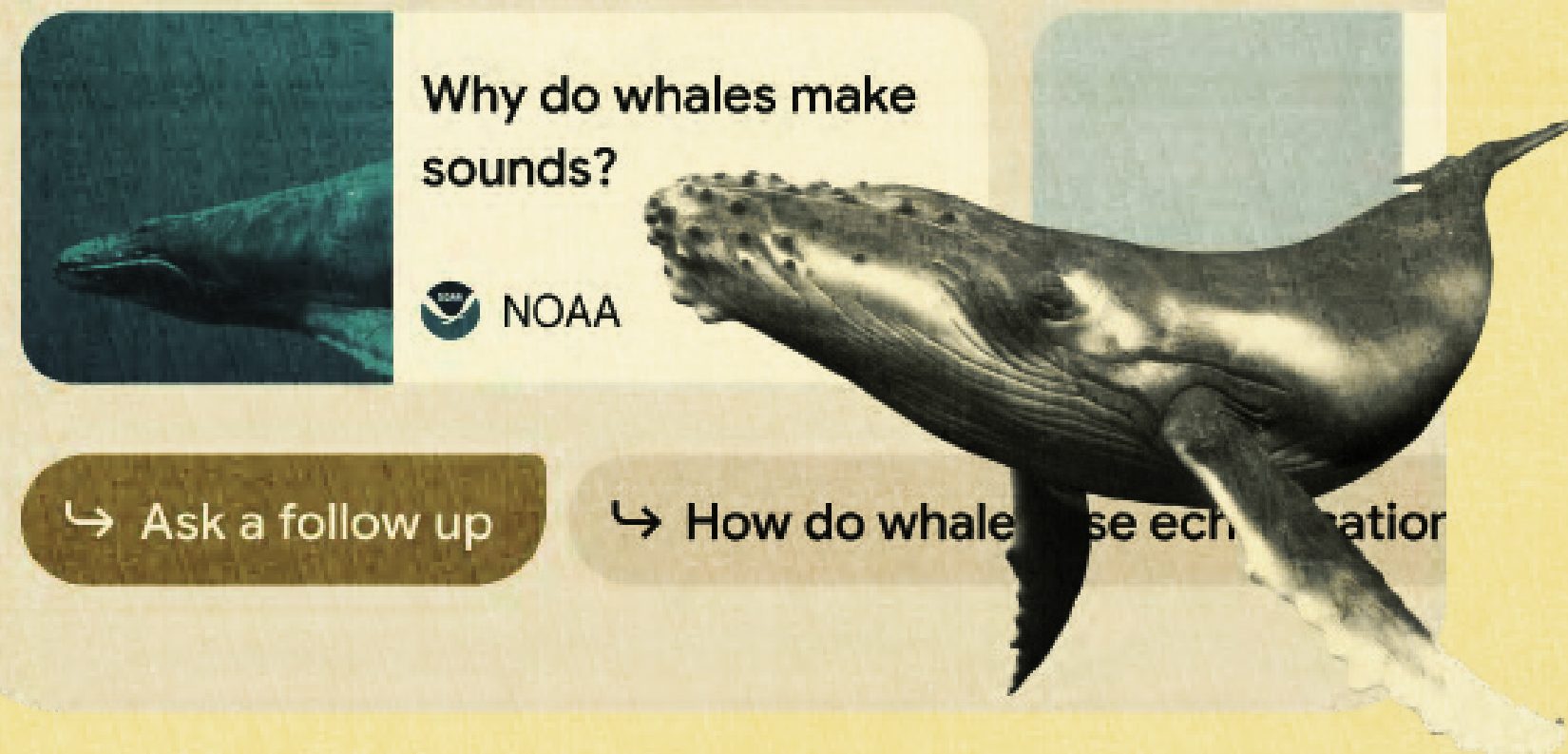
Generative AI is experimental. Info quality may vary.



Whales may sing for many reasons, including to:

- Communicate and socialize with other whales
- Find food and other whales
- Coordinate behavior during mating season
- Express their emotions, such as when they are feeling lonely or have lost a loved one

Marine mammals like whales usually produce sound through vocal cords in tissue called the larynx.



Left: Search Generative Experience from Google

In 2024, marketers will face the exciting challenge and opportunity to adapt to the future of search through content, SEO, and search advertising.

Today, the thought of looking up something in an encyclopedia baffles members of Gen Z, who grew up with never-ending information and answers at their fingertips. Soon, however, the idea of scrolling through multiple links on a search engine results page, or SERP, might seem just as archaic.

Search is changing right before our eyes. And it's all thanks to—you guessed it—AI.

Over the last few years, zero-click searches have been making up an increasingly larger share of search behavior. Users are shifting from conducting typical query-based web searches to using voice search, conducting discovery-based searches on platforms like TikTok, and looking to chatbots, like ChatGPT, Bing Chat, or [Google's Search Generative Experience \(SGE\)](#), to find information.

Altogether, we're witnessing new technology and behaviors converge in a way that will redefine "search" forever.

GenAI-powered searches allow for a more conversational and contextual experience for users, helping them find their answers without even having to leave the search results page. Search engines can highlight key points within longer text, extract additional information, and prompt follow-up questions.

This kind of large language model-generated output is so distinct from a typical search engine result page that [Search Engine Land](#) thinks it deserves its own name: "CHERP," or Chat Experience Results Page.

Bottom: Google search result page "What is SERP"

The screenshot shows a Google search result page for the query "what is a serp". The search bar contains the text "what is a serp" and the Google logo is on the left. Below the search bar, there are navigation options: All, Converse, Images, Videos, Shopping, News, More, and Tools. A "SafeSearch" dropdown is visible on the right. A warning message states: "Generative AI is experimental. Info quality may vary." The main content area features a featured snippet: "A SERP, or Search Engine Results Page, is the page that displays after a user enters a search query into a search engine. SERPs include links to webpages that are relevant to the user's query, along with additional information or images. SERPs also include organic search results, paid Google Ads results, Featured Snippets, Knowledge Graphs, and video results." Below this, another snippet explains: "A SERP can also stand for Supplemental Executive Retirement Plan, which is a set of benefits that a company may offer to top-level employees in addition to their standard retirement savings plan. SERPs are a type of deferred compensation plan that a firm provides to certain people in management or to highly compensated employees." To the right of the text are three search results cards: "What Is a SERP? Search Engine Result..." from Semrush (dated Jan 2, 2023), "Supplemental Executive Retirement..." from Investopedia, and "Risks and Rewards of a Supplemental..." from Great Oak W... At the bottom, there are several "Ask a follow up" suggestions: "Is SERP better than 401k?", "What is the difference between SEO and SERP?", and "What does SERP mean in finan".

In 2024, marketers will face the exciting challenge and opportunity to adapt to the future of search through content, SEO, and search advertising. The key will be to focus on user experience by providing content that serves the informative but conversational nature of GenAI-fueled searches—rather than relying on traditional SEO tactics and KPIs like page rank and CTR.

To remain discoverable, relevant, and competitive in the search landscape, marketers should refrain from using tools like ChatGPT to churn out optimized but generic written content, and lean into what makes their content distinctive.

Elements like quotes, proprietary ideas, or unique stats can help add the humanity and quality signals that AI models look for when determining which content should rank above similar pieces. Other more creative content formats, like video and images, will provide additional avenues for search discovery.

By focusing on human nuance and creativity—and leaving writing metadata, alt-text, and other technical, time-consuming tasks to ChatGPT—brands will be able to more effectively reach their audiences in the age of smart digital search and AI-generated content.

# 3 WITH TECH AND DATA, THE FUTURE IS NOW



3.1 Spatial computing gets good.  
Really good.

3.2 Web3 is not dead, but...

3.3 Gamers are here for new-age  
tech (and open to marketing)

3.4 Social media goes freemium

3.5 Every company is a data  
company so... what's next?

3.6 Offshore, nearshore,  
friendshore, reshore

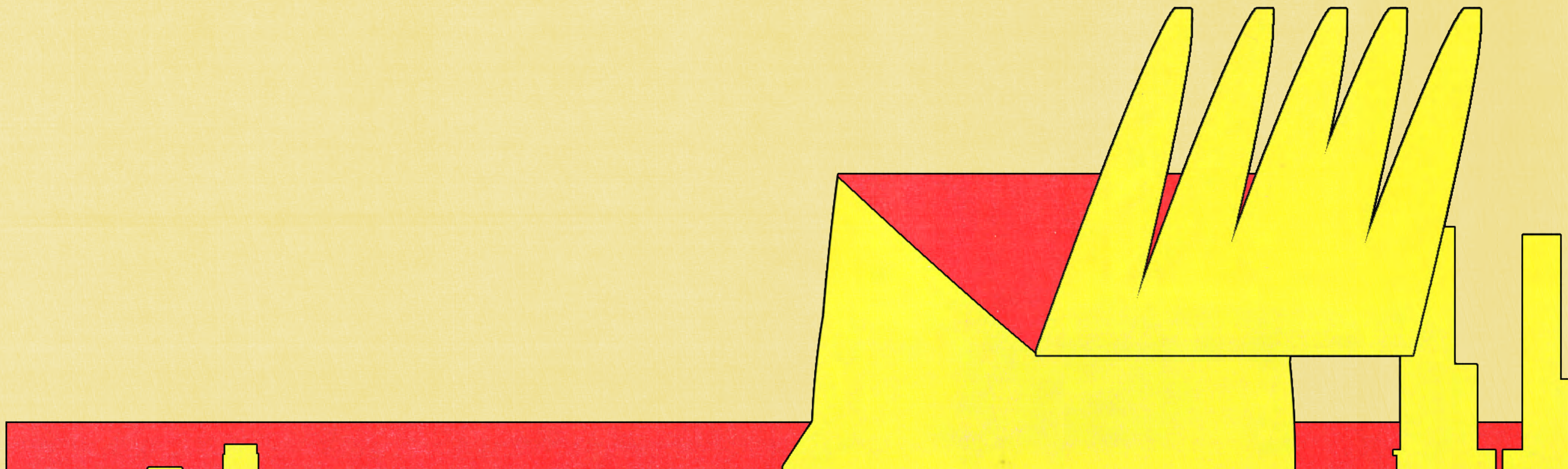


When it comes to technology and data, it's time to stop asking "what's next?" because, frankly, what's next is already here. AI might be hogging headlines but don't get it twisted: between quantum computing, 3D technology, AI-powered data modeling, and processing power, it's impossible to overstate just how future-forward the outlook for tech and data has become.

This past year, many brands opted to tighten budgets by playing it safe, focusing on tech debt and product enhancements. But 2024 will be all about going bigger and better with technology.

Brands must be ready to re-invest in innovation and data integration. Those who find success will earn the power to set a new standard for their industry for everything from customer experiences to customization to product offerings and speed.

# 3.1 SPATIAL COMPUTING GETS GOOD. REALLY GOOD.





This is the year for brands to include spatial computing in their digital strategies, with one important caveat: their use of technology can't be style over substance.

In 2013, Google launched the first mainstream AR headset, Google Glass. A few years later, Snapchat launched "Spectacles."

Both were failures.

When we look back at this product, it's not difficult to see why it didn't live up to expectations. Essentially, there wasn't a product-market fit. Google Glass didn't align with what users needed at the time. After all, who needed the time projected across their vision when watches and phones existed?

But where other products have failed, the new Apple Vision Pro will succeed.

If Apple is betting on this technology, it's with good reason. Over the past decade, AR, VR, and headsets have been normalized. A generation of gamers adore these technologies, and their enthusiasm has spread. Similarly, the technology powering these devices is more advanced than ten years ago, with eye tracking, immersive AR, VR, and high resolution. And, when it comes to aligning with user needs, the marketplace business model enables users can download whatever applications they choose.

For brands and businesses with iOS applications, these will publish automatically on Apple's Vision Pro alongside the App Store. According to Apple, "Most frameworks available in iPadOS and iOS are also included in visionOS, which means nearly all iPad and iPhone apps can run on visionOS, unmodified."

Now, a disclaimer: Most brands do not need to rush to develop a visionOS app since such a small fraction of users will purchase the Vision Pro in 2024. However, this device will accelerate AR/VR adoption so it's essential to properly evaluate spatial computing for your digital products.

## Profile: Bringing VR headsets into the pediatrician's office

Bottom: Smiley Scope: Bringing virtual reality into the pediatrician's office

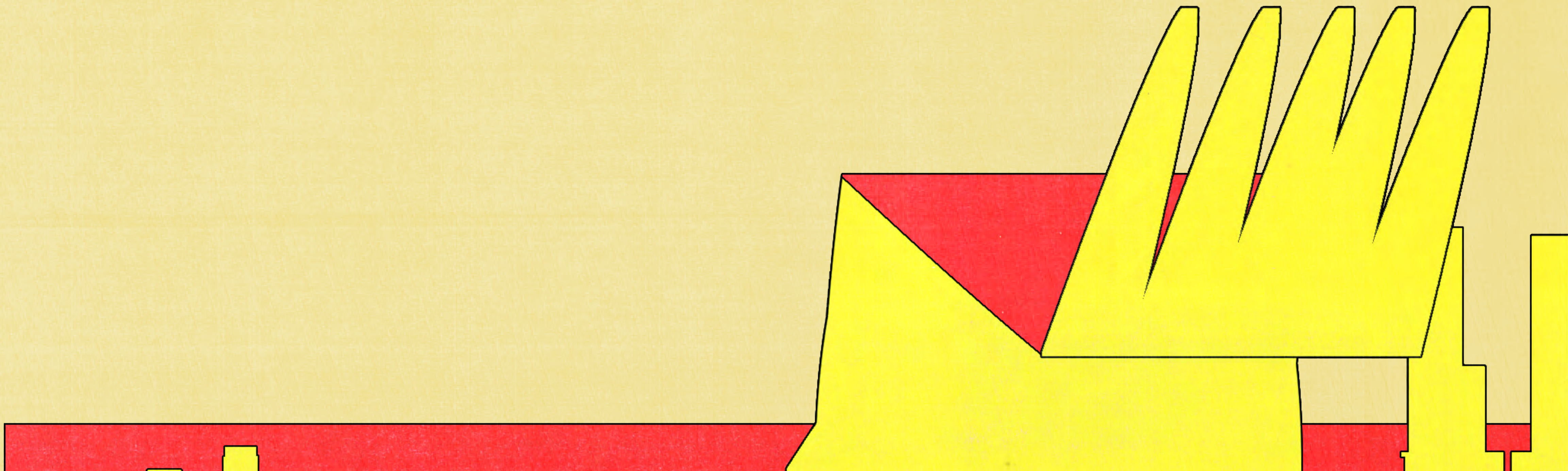
For many brands, this is the year to include spatial computing in their digital roadmap, with one important caveat: It can't be style over substance. To succeed, brands must evaluate mixed reality use cases within their specific industries, learn what their users want and need, and test new AR functionality within their iOS apps before launching a new experience.

Within this new era for experiences, brands with experience in immersive design, AR lens development, and Xcode are already well situated. However, an exciting new player is about to enter the market, thanks to Apple's Vision Pro. The launch of visionOS will create space for new brands to take hold, and those that quickly iterate on visionOS will be miles ahead of their competitors.



# 3.2

# WEB3 IS NOT DEAD, BUT...





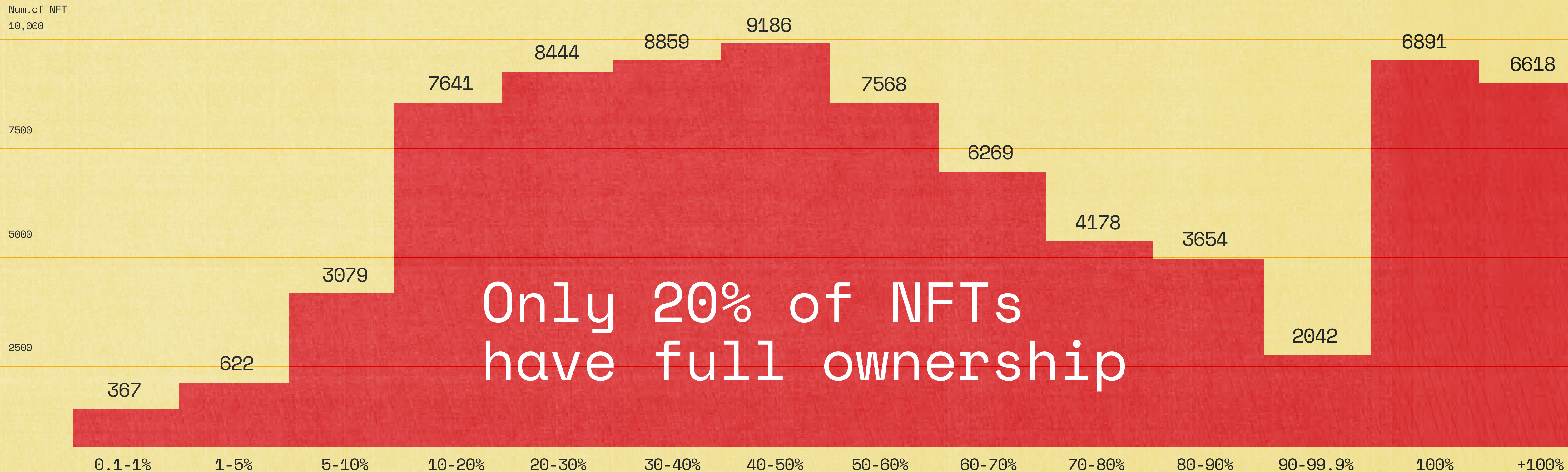
# Before Web3 can run, skip, or even walk, public perception needs to change.

Bottom: Graph from "Dead NFTs: The Evolving Landscape of the NFT Market"

2023 wasn't a pretty year for Web3. Sam Bankman-Fried stole about \$10 billion by inserting a single number into millions of lines of code for his cryptocurrency exchange, FTX.

Beyond that breaking news, VC funding in cryptocurrency businesses fell off a cliff. And 95% of NFTs were found to be worthless. Yikes.

But, despite these issues, Web3 and the digital asset economy aren't ready to be written off just yet. It wasn't the underlying technology of cryptocurrency and blockchain as a whole, that led to the collapse of FTX. Instead, it was the absence of regulation—not unlike what we observed in the Enron case—that gave people like Sam Bankman-Fried the opportunity to mishandle customer assets.

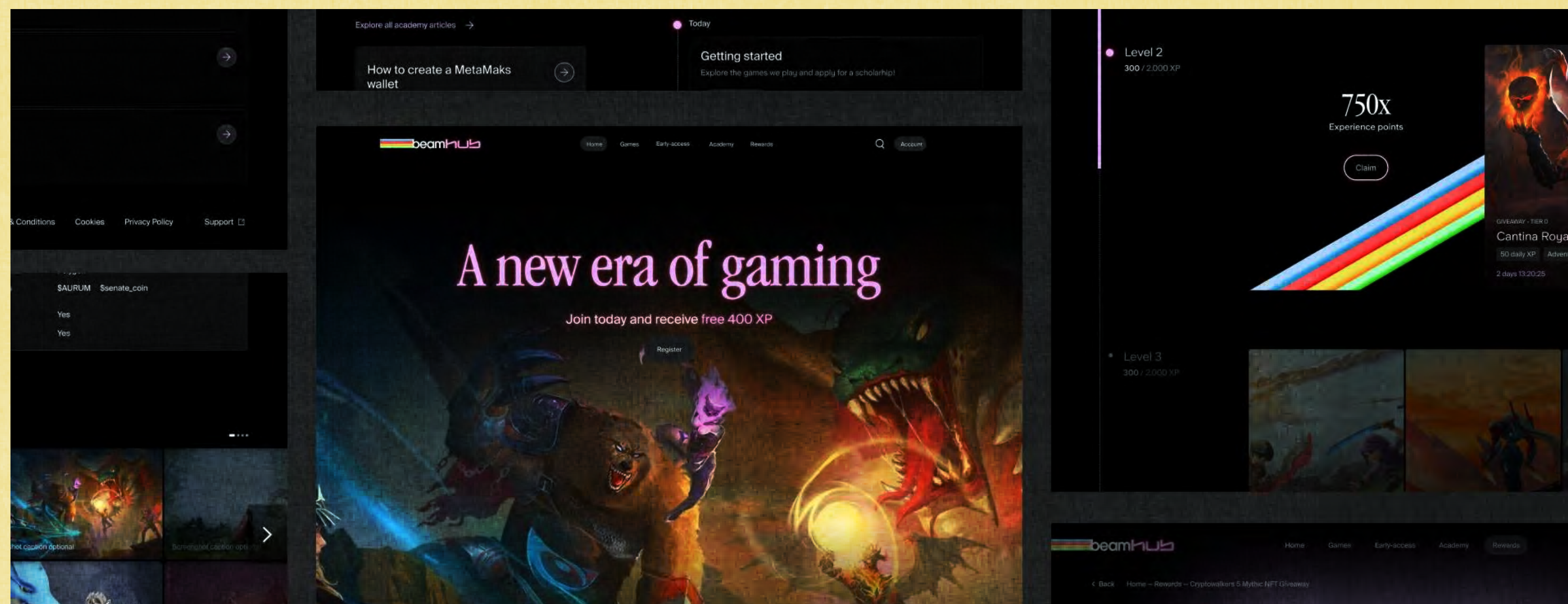


Before Web3 can run, public perception needs to change. And before public perception can change, regulators must create a framework that safeguards investors, promotes transparency, and ensures proper monitoring of digital asset entities. Until then, it will remain difficult to convince average users and boards to embrace the value of Web3's offerings.

Looking to 2024, we don't expect a banner year for Web3. Still, given the growth in developer activity on Ethereum for the past two years and the steps in improving the user experience for blockchain-enabled applications (e.g., Account Abstraction), we might see some surprising launches.

More than half of the Fortune 100 companies have explored blockchain/Web3 initiatives since the start of 2020. Blockchain companies such as Avalanche, Immutable, and Polygon are doubling down on gaming. NFTs are relevant and ready to be used for real-world use cases. The anticipation of a Bitcoin exchange-traded fund (ETF) has improved confidence in Bitcoin.

Fast forward a few years, and it's not hard to imagine a world with clear regulations and widespread adoption of blockchain technology or crypto on various consumer-based applications.



Top: Beam network

Bottom: The hall zero limits from Sprit

# 3.3

# GAMERS ARE HERE FOR NEW-AGE TECH (AND OPEN TO MARKETING)



Your future customer is a gamer and your future UI is a game. Advertisers and brands must adapt to consumer behavior, which is increasingly in these 3D social spaces.



\$347  
billion

The revenue from the worldwide gaming market was estimated at almost 347 billion U.S. dollars

\$248  
billion

The mobile gaming market generating an estimated 248 billion U.S. dollars

Gaming continues to evolve. Already it's gone from an activity for casual night into a \$350 billion industry with a hardcore fandom. And it's only getting bigger. In 2024, gaming's continued evolution will center around its ability to immerse users. Technological breakthroughs—like what the industry experienced with the release of Unreal Engine 5—combined with powerful storytelling and the inevitable introduction of GenAI will create truly out-of-this-world experiences.

Look at the major happenings in the market:

- The hype around Grand Theft Auto #6 is real and rumored to be released in 2025" instead of "April 2024. This best-selling game is expected to have mind-blowing graphics and massive open-world gameplay.

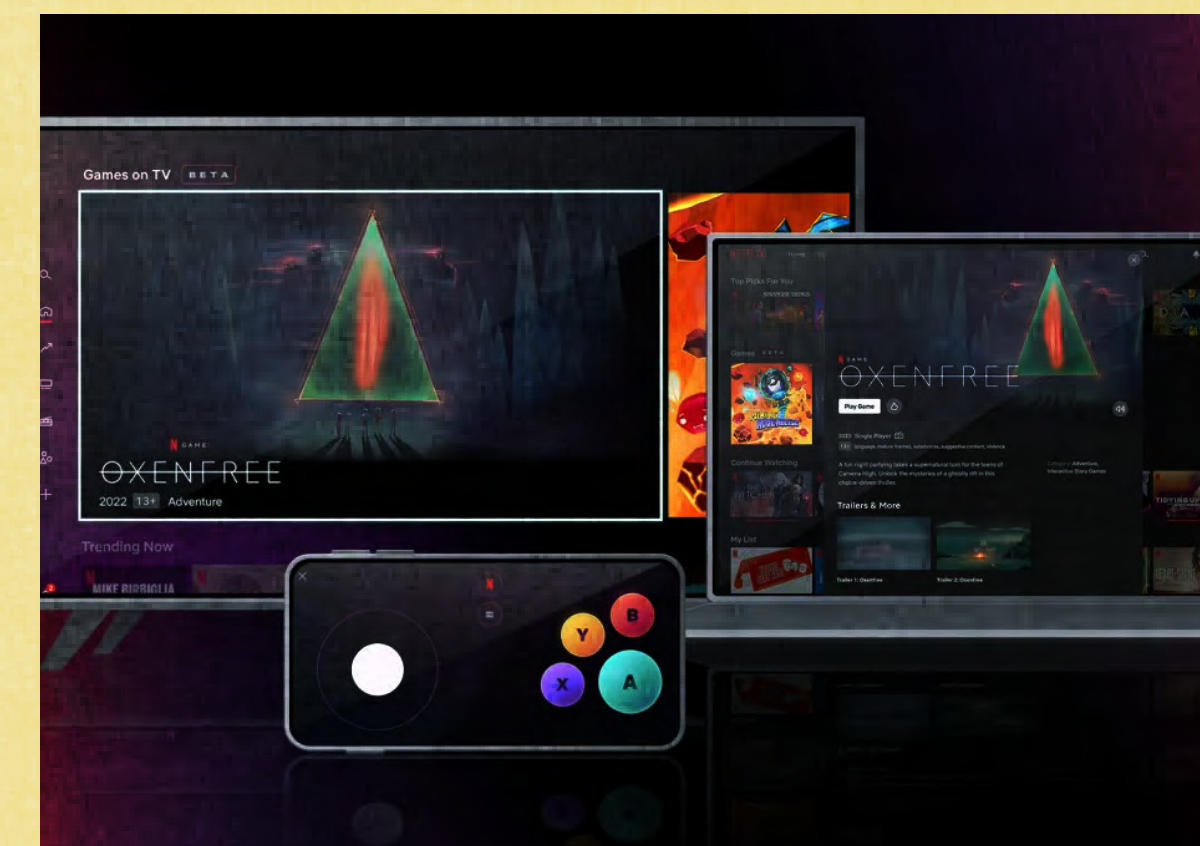
- Netflix's continued rollout of its cloud gaming service. What began with a focus on mobile will evolve into a massive cloud gaming service using IP that already has a powerful fanbase. Who wouldn't jump at the chance to play Stranger Things: The Game?
- In Q3 of 2023, Roblox reported 70.2 million average daily active users—more than 14 million more than there were barely a year ago.
- Fortnite is recruiting big-name celebrities for its "Icon Series" skin collection. The latest one was Lewis Hamilton, the British race car driver.

This phenomenon makes gaming the space to watch for cultural relevance and marketing growth. In a global study conducted by YouGov, roughly half of consumers believed product placement in video games is effective brand promotion. This remained true across most age brackets. The most effective products in games? Electronics, cars, clothes, food, and media.

The reality is games aren't just games. They're the new social media, catwalks, stadiums, storefronts and classrooms. Gaming platforms will be interlinked in the future in ways we can't yet fathom. Your future customer is a gamer and your future UI is a game. Advertisers and brands must adapt to consumer behavior, which is increasingly in these 3D social spaces.

With the increasing integration of AI in games, brands will have the power to create personalized and engaging in-game experiences. This, combined with adaptive and cross-platform technologies, means that brands can connect with gamers across multiple games and social media platforms, expanding reach and engagement.

That said, there's still work to be done. A critical focus for brands in 2024 should be a continued commitment to diversity, inclusion, accessibility, and ensuring the safety and privacy of younger gamers.



Left: Lewis Hamilton Fortnite Icon Series Skin

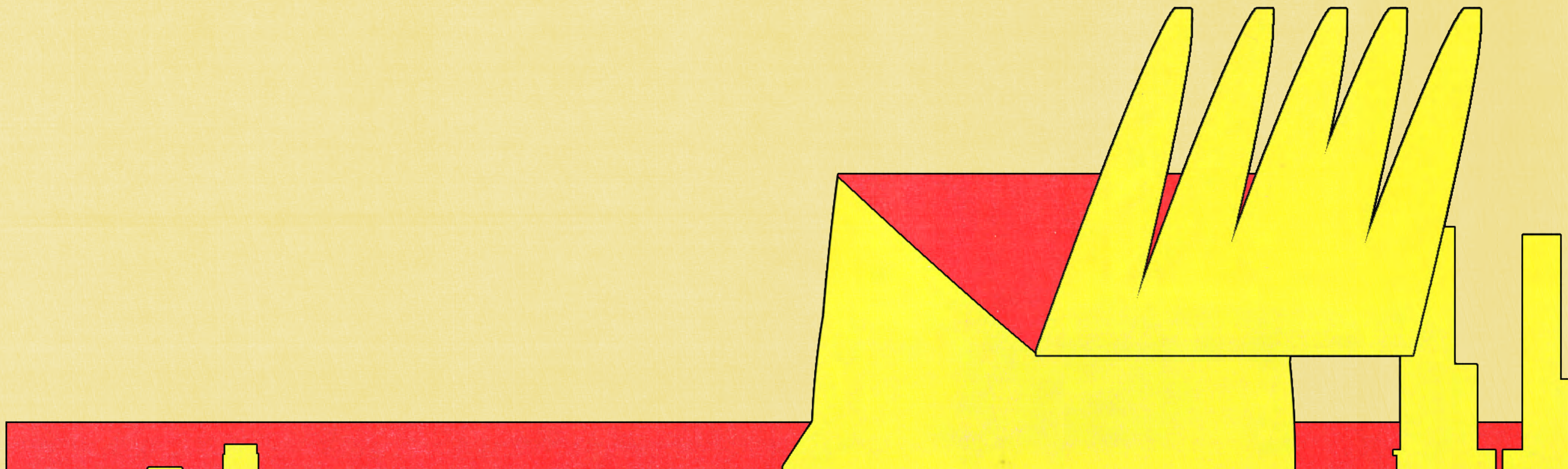
Right top: Netflix's cloud gaming service

Right middle: Roblox mobile interface

Right bottom: Grand Theft Auto #6

# 3.4

# SOCIAL MEDIA GOES FREEMIUM



Relying solely on one platform will be risky, as changes in revenue models or API access can impact reach and targeting capabilities.



Most social media platforms have had the same revenue model for decades: the sale of user data to companies for targeted advertising.

But there's been a shake-up.

X, formerly known as Twitter, first began tinkering with revenue models when the company launched its infamous \$8 per month subscription for verification. Despite the mayhem created by that first experiment, X continued to launch new subscriptions. In late 2023, they announced a \$1 per year subscription fee [to write tweets](#) in New Zealand and the Philippines.

Meta announced that it will offer people in the EU, EEA, and Switzerland the choice to pay a monthly subscription to Facebook and Instagram [without any ads](#). Alternatively, they can continue to see ads if they don't wish to pay the monthly fee (between €9.99 and €12.99 per month).

And, finally, both Reddit and X changed their API access fee—forcing many third-party apps to shut down. Many are calling this bad for innovation within [social media ecosystems](#).

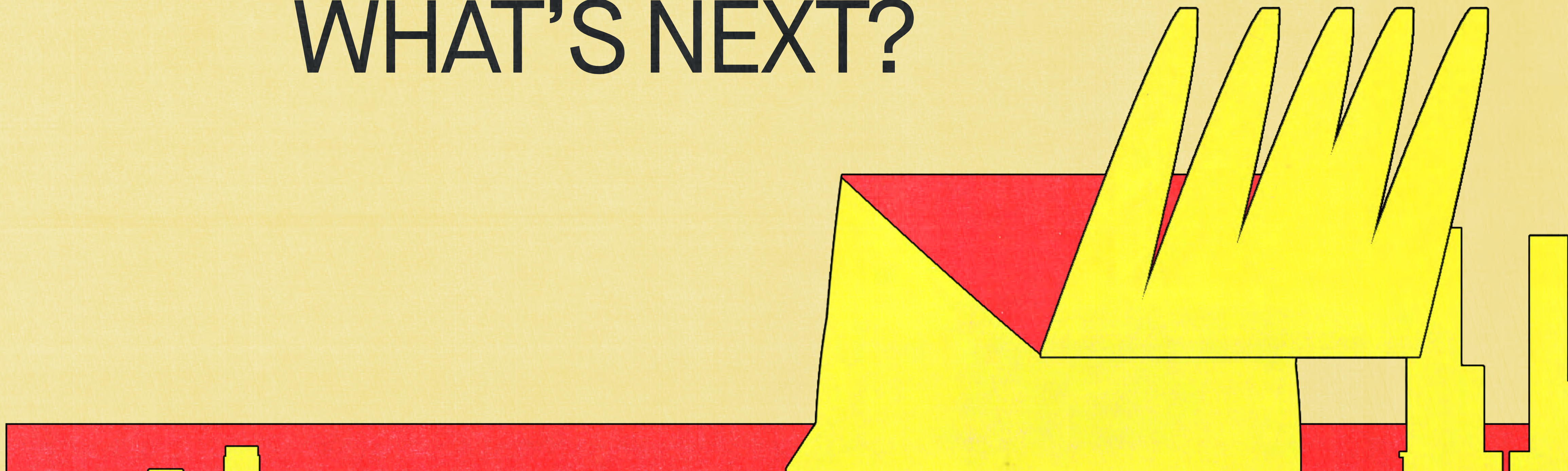
So, what does this mean for brands?

Given the evolving landscape of social media platforms, in 2024, it will be essential to diversify marketing channels. Relying solely on one platform will be risky, as changes in revenue models or API access can significantly impact reach and targeting capabilities.

Brands should consider investing in other channels, such as influencers, chat, or even emerging social media platforms, to ensure a broader reach and mitigate risks associated with platform-specific changes.

# 3.5

# EVERY COMPANY IS A DATA COMPANY SO... WHAT'S NEXT?





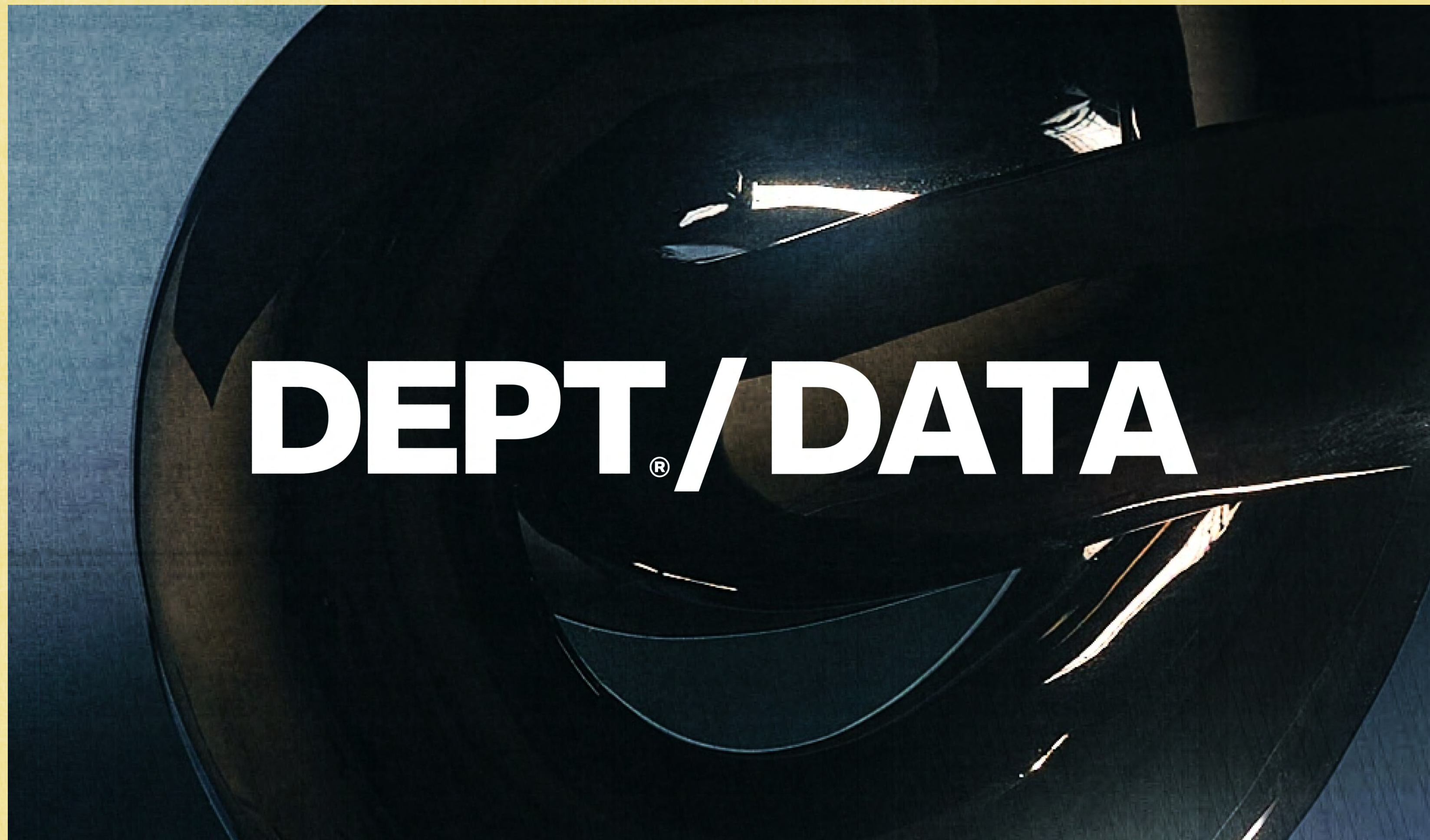
# AI tech is about to be massively commodified and your data will be your differentiator.

Ever say a word so many times it starts to lose all meaning? Collectively, we might all be reaching that point with "data."

Even before the pandemic ushered in full-scale digital transformation across industries, data quickly became companies' most valuable asset. Today, we're fully living in a data economy, and any business that wants to remain competitive in the coming years needs to have a strong and strategic data foundation.

"AI tech is about to be massively commodified and your data will be your differentiator," Isabel Perry, our VP of Emerging Tech, explained at [Advertising Week New York](#). "So, you need to get that in place and working hard for you."

The unsaid bit? Without a secure and sustainable data architecture that allows an organization to collect, store, and organize raw data and turn it into something that can be used, even the most advanced AI products won't be able to deliver accurate, actionable insights. And insights derived from brands' zero- and first-party data are essential for building unique, personalized relationships with customers.



The majority of headlines, trend predictions, and panel discussions going into 2024 will likely discuss the imperative for brands to jump into AI ASAP.

However, according to a [survey](#) from NewVantage Partners, less than one-quarter of companies would classify themselves as “data-driven,” and just shy of 21% have developed a data culture. Organized, actionable data is essential to maximize AI.

Until an organization has cultivated an integrated, data-first approach across its business, it should focus on:

1. Establishing a modern, future-proof foundational data infrastructure where data is stored securely, backed up, and accessible to the entire organization.
2. Enabling real-time data processing supported by clear reporting and visualization.

There's no doubt that AI/ML is going to continue massively transforming the way organizations approach marketing. But when all brands have access to the same AI tools, platforms, and third-party data, the ones that have invested the time and resources into building their data foundation and strategy will be in a stronger position to deliver targeted impossible-to-imitate customer experiences.

Right: OpenAI launched OpenAI Data Partnerships, where they'll work together with organizations to produce public and private datasets for training AI models

[Menu](#)

Blog

# OpenAI Data Partnerships

Working together to create open-source and private datasets for AI training.

[Submit interest](#)

# 3.6

# OFFSHORE, NEARSHORE, FRIENDSHORE, RESHORE



# Amid an uncertain, fluctuating economy, the share of companies nearshoring tripled from 2022 to 2023.

Most people had never given a moment's thought to supply chains or semiconductor chips... until the COVID-19 pandemic hit. As shipping times lengthened, material costs skyrocketed, and certain products were simply unavailable, people around the world realized the impact of broken supply chains.

While the pandemic may be old news, new global events—like the tariffs and trade agreements made in response to geopolitical conflicts—have underscored once again the fragility of international supply chains.

As a result, reshoring (or “nearshoring”) offshore software development, managed services, or manufacturing has become an increasingly enticing alternative for many businesses, despite the financial cost.

In fact, amid an uncertain, fluctuating economy, the share of companies nearshoring tripled from 2022 to 2023 for reasons including:

- Resilience and risk mitigation
- Improved communication and collaboration
- Quality at a competitive cost
- Talent accessibility
- Improved sustainability



Top: A worker sits at his desk at an Interfil automotive-parts factory in Tultitlán de Mariano Escobedo, Mexico, owned by Premium Guard



In the US, businesses are looking toward Mexico and other parts of Latin America as a manufacturing destination. Morgan Stanley forecasts the potential to increase Mexico's manufacturing exports from \$455 billion today to \$609 billion in just five years. Similarly, businesses are rapidly setting up shop in central-eastern European countries, with demand for factory space increasing by 29% in 2022.

Also notable is the expansion of dynamic random-access memory, or DRAM, chip production in the US. Micron, one of the world's three top manufacturers of these memory chips, is launching the US's biggest-ever semiconductor chip effort. It plans to spend over \$100 billion over the next few decades on chip fabrication plants, kicking off production in 2026 in Boise, Idaho.

Micron's CEO predicts the company's investment in US-based production will bring the country's share of global DRAM manufacturing from 2% to about 15% over 20 years.

Demand for memory chips is expected to dramatically increase with the rapid growth of AI, LLMs, and other more sophisticated technology that requires additional memory. Already, the US government has set aside more than \$52 billion of funds to incentivize chip companies to reshore manufacturing.

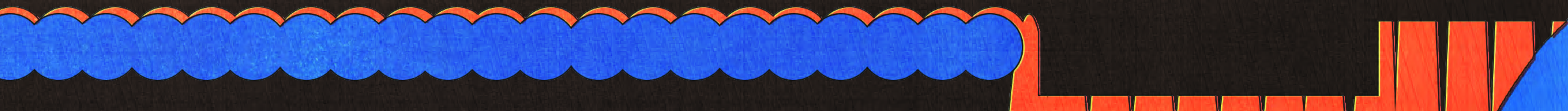
Across the pond, the European Union is also making strides to remain competitive in the semiconductor production market with its passage of the European Chips Act. The €47 billion package will aid the EU's ambition to double its market share global in chip development and fabrication by 2030.

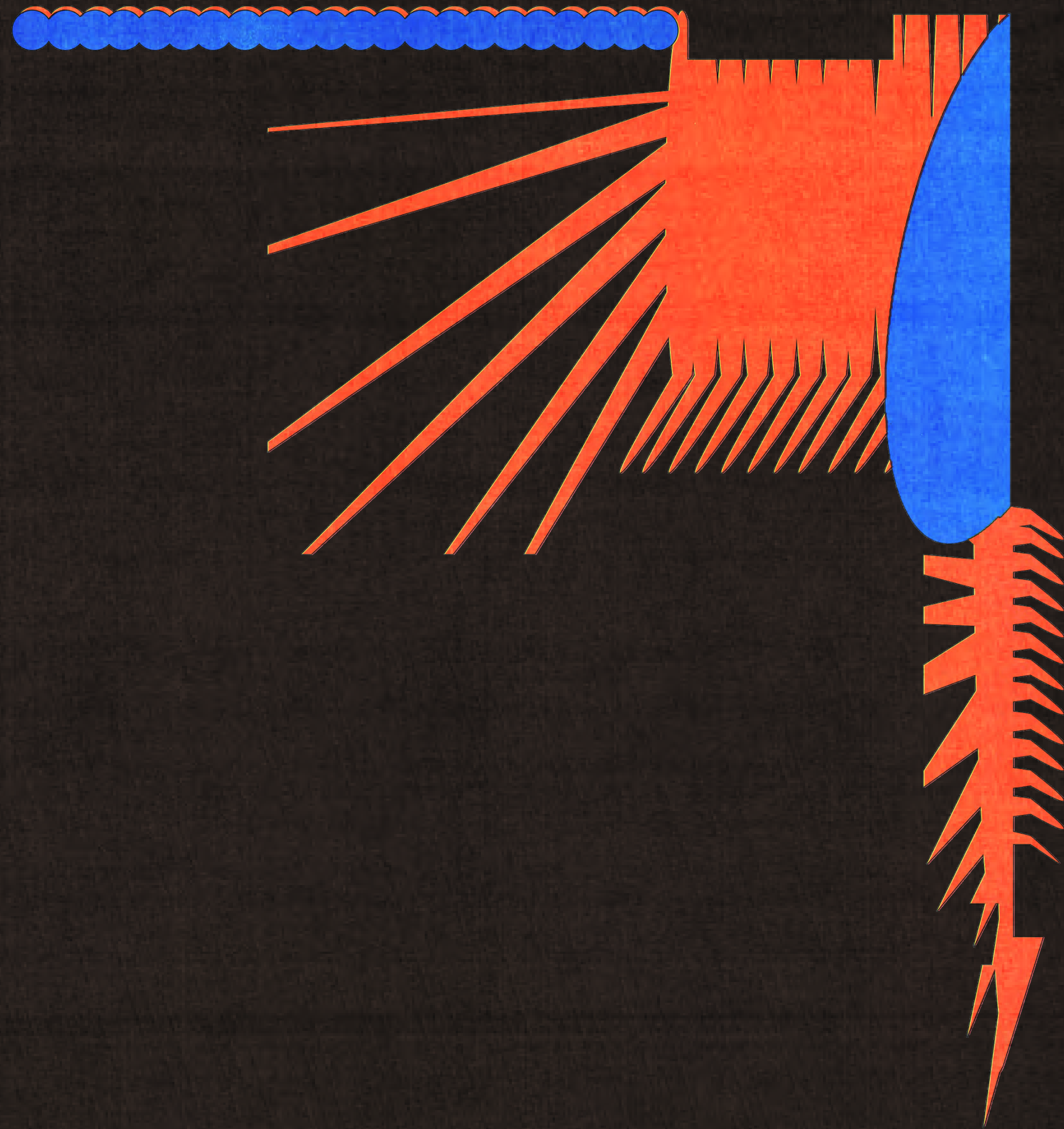
Looking ahead, we can expect to see more tech manufacturers diversify their production locations beyond China. By bringing additional computing power and semiconductor expertise to North America and Europe, these regions stand to strengthen economic resilience and lessen their reliance on foreign electronic manufacturers.

Left: A rendering of Micron's planned four memory chip fabs it will build north of Syracuse, New York, spending \$100 billion over the next 20 years.

# 4 PEOPLE AND THE PLANET

- 4.1 Good design is accessible design. Full stop.
- 4.2 Brand safety gets turned upside down
- 4.3 A new chapter in mobility is more about the journey than the destination
- 4.4 Mitigating impact with the power of innovation

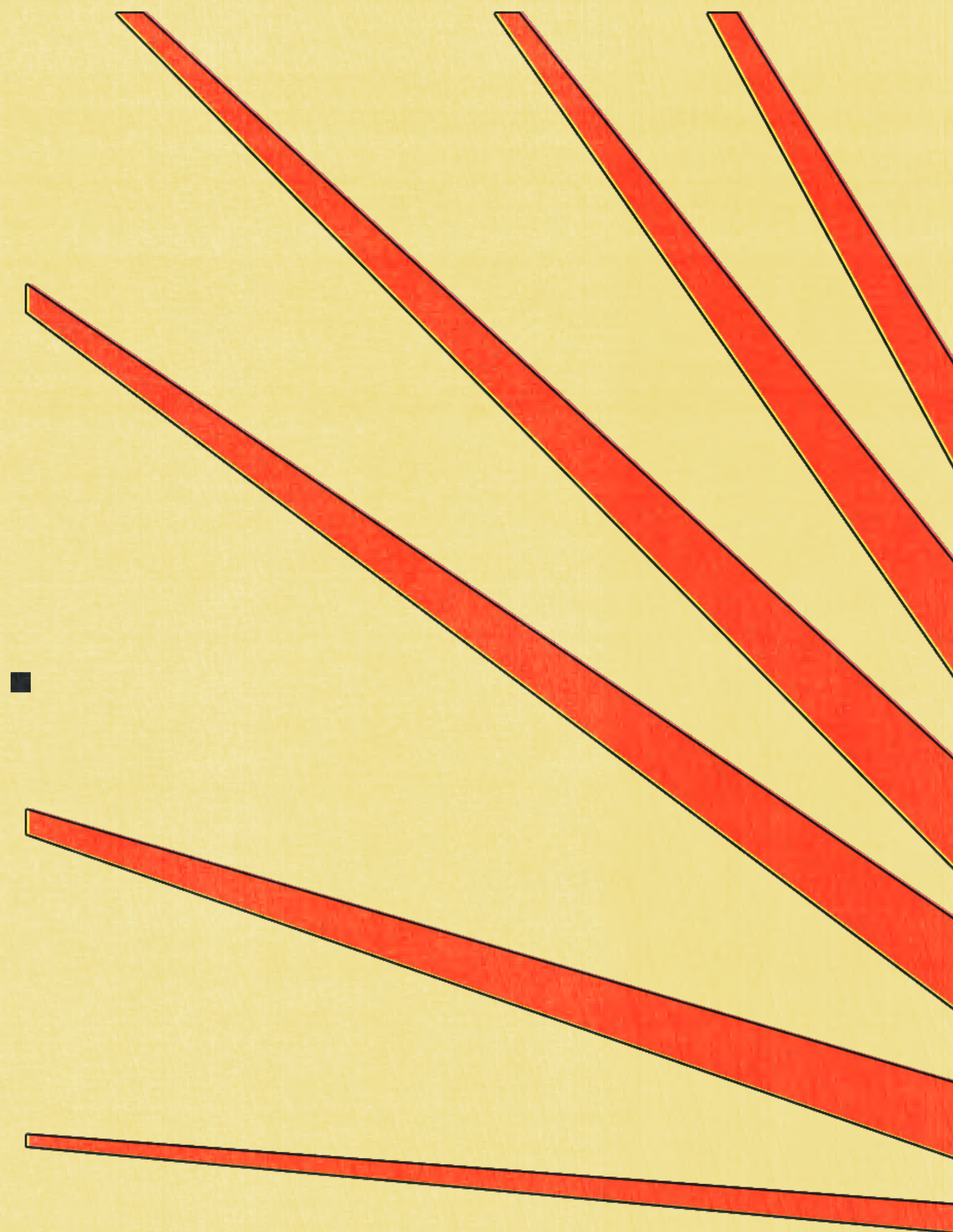
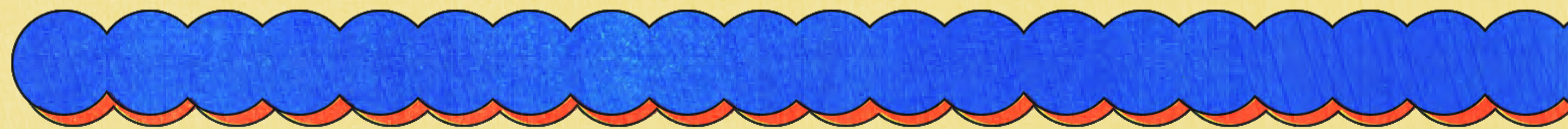




The message for people and the planet remains what it has been for years: we can do better. While there's no silver bullet solution for solving climate change or the mental health crisis, technological advancements —combined with consumers' desire for activism, accessibility, and sustainability—will create new business opportunities to drive meaningful change in 2024.

In the past, we've seen some businesses establish themselves as highly trusted ethical leaders, shaping societal impact. This illustrates a shift in mindset in both business and society and a collective desire for meaningful transformation. To succeed in this endeavor, collaboration is crucial—requiring not just unity but a holistic approach beyond consumption—and looking at broader shifts within every aspect of our culture and society.

# 4.1 GOOD DESIGN IS ACCESSIBLE DESIGN. FULL STOP.





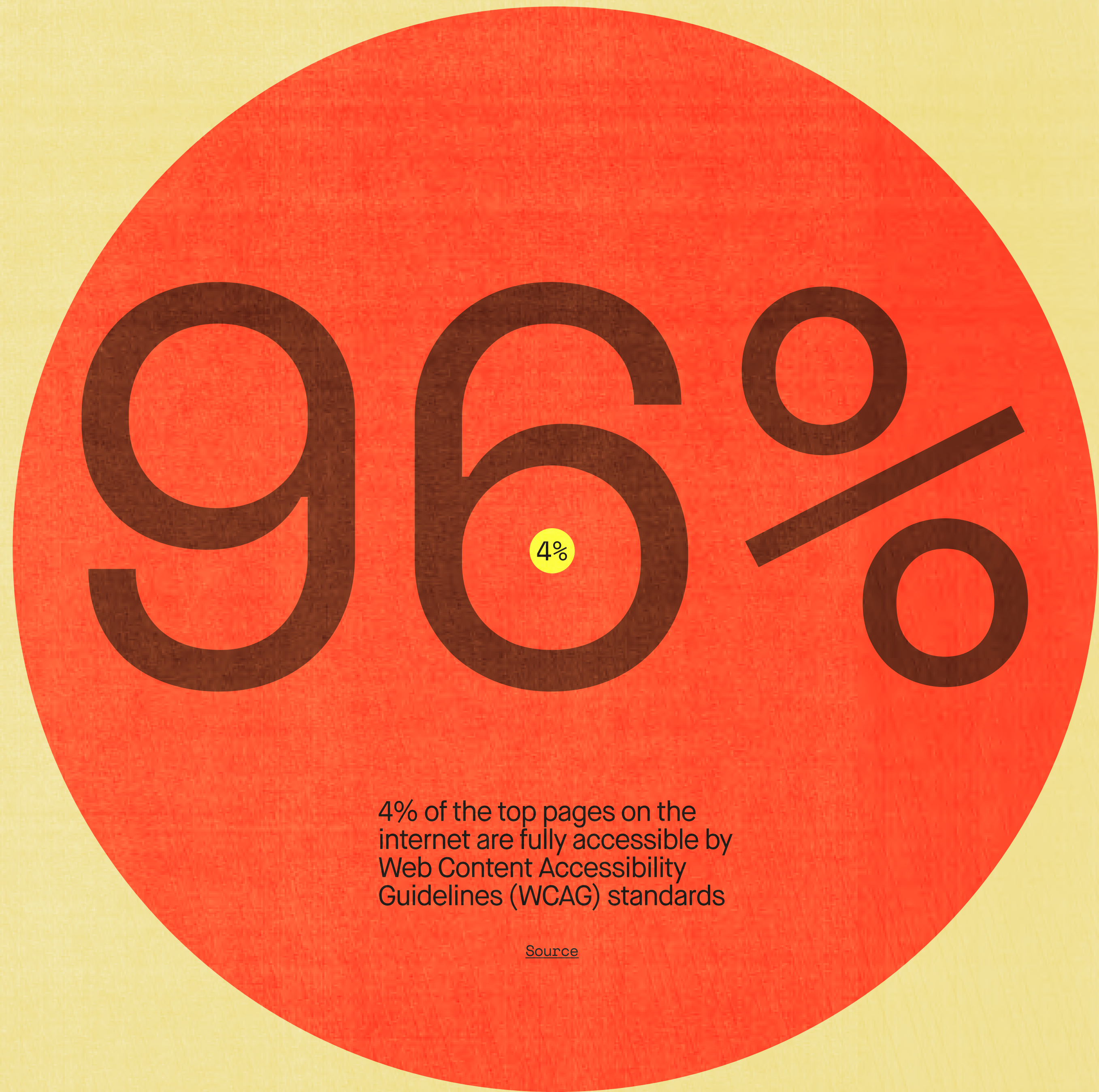
# Designing digital products for accessibility will no longer simply be “nice to have.” Instead, accessibility will be a priority inextricably linked with brands’ creative practices.

In a recent [study](#), McKinsey asked blind and low-vision research participants what digital accessibility means to them. The overarching response was clear: a desire for a seamless experience that is comparable to that of those without disabilities.

Seems reasonable, right?

But even with more than [1.3 billion people](#) around the world living with a disability—that’s one out of every six people!— more than 96% of the top pages on the internet are not fully accessible by Web Content Accessibility Guidelines (WCAG) standards. And that’s not even including people whose digital accessibility is limited because of low bandwidth, internet availability, or other economic and geographic constraints.

These days, consumers interact with twice as many industries digitally as they did before the pandemic. As our digital reliance continues to grow, businesses and organizations across most industries, from banking to grocery to retail and beyond, are not only forgoing valuable potential relationships with a sixth of the population, but they’re also missing out on billions of dollars annually due to inaccessible digital designs.



Source

# How to improve e-commerce accessibility & ensure inclusivity



As the global population rapidly ages over the next several years, businesses that aren't ensuring a seamless, inclusive, and accessible digital experience only stand to lose more money and trust from frustrated customers.

In October, the World Wide Web Consortium (W3C) released its latest version of web standards, [WCAG 2.2](#). These updated guidelines include nine additional success criteria to measure the success of web accessibility across four principles:



- ① Perceivable
- ② Operable
- ③ Understandable
- ④ Robust

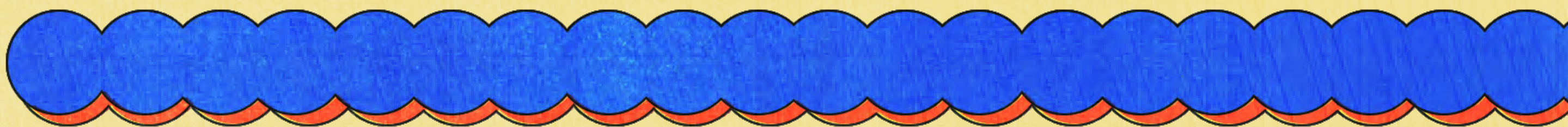
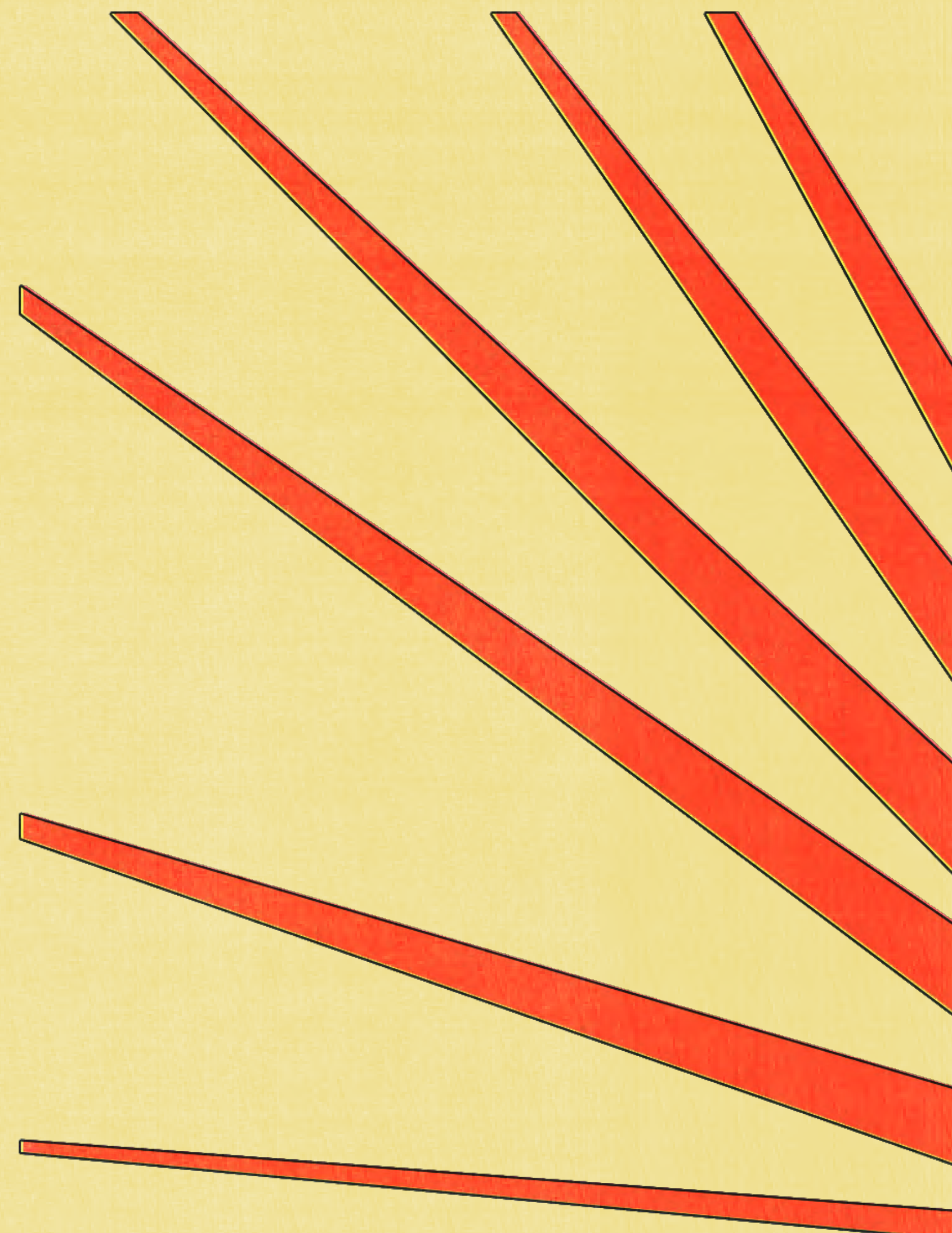


In the coming years, designing digital products for accessibility will no longer be a "nice to have" but a priority inextricably linked with brands' creative practices. That's because the [European Accessibility Act \(EAA\)](#) goes into effect in 2025, requiring most digital products to embrace accessibility, conforming to WCAG 2.1 level AA.

Of course, not all businesses fall under the EU's jurisdiction and must comply with their own region's [disability requirements](#). But when brands can expect to see more than a quarter of all retail sales occurring via e-commerce by 2026, it shouldn't take laws to make digital accessibility a priority. Now is the time for brands to integrate accessibility into their core design principles.

Top: Photograph illustrating ageing and health  
Middle: 2025 is the deadline for digital accessibility  
Bottom: The need for e-commerce accessibility & inclusion

# 4.2 BRAND SAFETY GETS TURNED UPSIDE DOWN



Brands are contending with a variety of challenges that threaten to upend the precarious balance of advertising-driven reputation and revenue.



80%

of advertising professionals are concerned about brand safety

Source

More than 80% of advertising pros are concerned about brand safety, according to a study from the Advertising Research Foundation. And in today's unpredictable media landscape, who can blame them?

Between the prolonged downfall of X (formerly Twitter), the upcoming US election, and the ongoing Israel-Hamas war, brands are contending with a variety of social and political challenges that threaten to upend the precarious balance of advertising-driven reputation and revenue.



Let's start with X. The Elon Musk-led platform hasn't done much to woo brands into sticking with them throughout 2023—even slashing ad prices wasn't enough to keep major advertisers around. But with an election cycle fast approaching that's predicted to entail more than \$10 billion in political ad spending, X is more than happy to reverse its previous ban on political ads.

Add in \$610,500 in fines from Australia's eSafety Commissioner for X's failure to provide information on its efforts to combat child exploitation on the platform, and it's looking like a pretty bleak place for brands to be associated with.

Image: Portrait of Elon Musk



Left: Illustration of the case for and against brand safety.

Right: Generative artificial intelligence has the potential to rapidly scan the internet to help marketers keep their ads away from content they consider bad for their brands.

Brands are also grappling with what feels like a second coming of the 2017 Adpocalypse, which saw major advertisers boycott YouTube due to extremist and terror-related content on the platform. While social media platforms have worked diligently to implement stronger moderation policies and advertising controls since then, videos of violence from the Israel-Hamas war have still found their way into the digital media landscape.

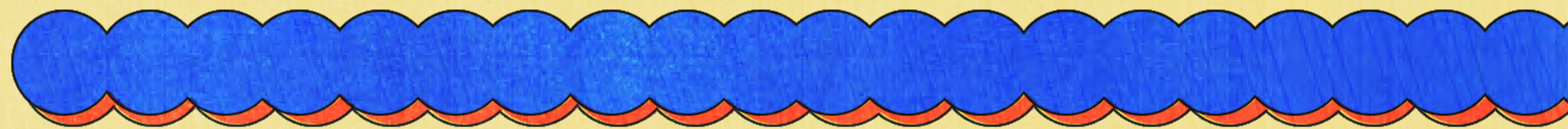
In the face of these and other obstacles, the number of “brand-safe” places and platforms for companies to advertise online is dwindling. Blanket keyword blockers result in popular media platforms losing advertisers due to fear of being associated with negative stories while driving up ad costs in “safe zones.”

In 2024, brands must start taking a more nuanced approach to brand safety, and the introduction of new AI- and ML-powered tools on the market may be the key for organizations to more effectively and efficiently address digital brand safety and suitability pain points. With the rise of more sophisticated automated technology that can better understand content context, advertisers will be able to more confidently invest in responsible, relevant media across a variety of ever-evolving platforms.



# 4.3

# A NEW CHAPTER IN MOBILITY IS MORE ABOUT THE JOURNEY THAN THE DESTINATION





Left: person cycling in urban environment

Government restrictions, combined with consumers' desire for modes of transportation that are convenient and environmentally conscious, will set the stage for a 15% decline in passenger miles traveled in private cars by 2035.

As their appetite for sustainability and from-their-phone convenience increases, younger generations' desire to drive—or even own a car—is shrinking.

This trend is part of a much larger one. As car sales peak over the next decade, McKinsey predicts a new chapter for mobility will unfold. This new chapter hinges on three major factors: electricity, micromobility, and technological innovation.

Although McKinsey predicts car sales will peak by 2030, sales will continue to rise in 2024 and beyond, thanks to the ongoing advancements in alternative fuels and autonomous driving.

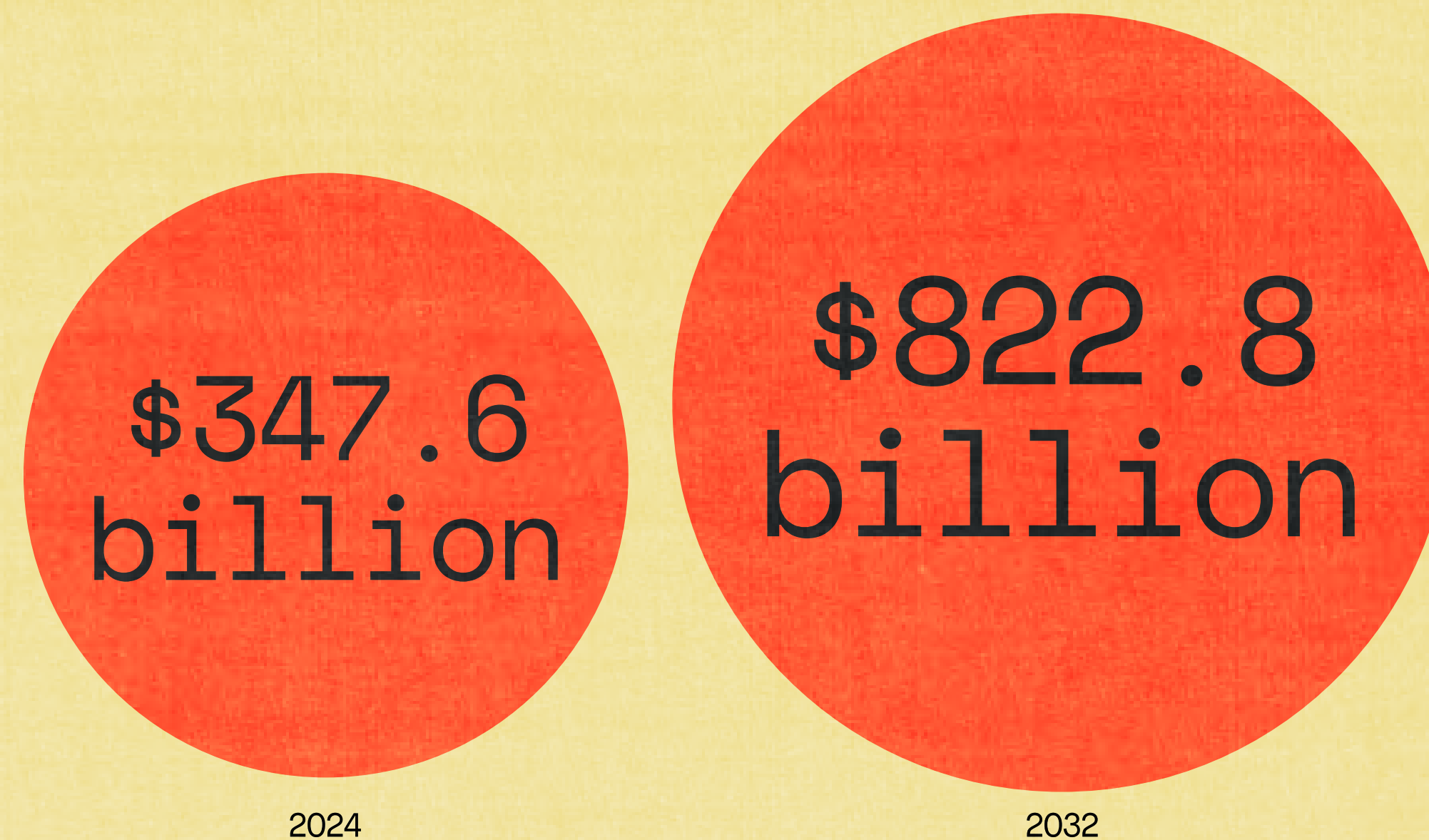
In 2022, we helped smart announce its entrance into the electrical vehicle market with the fully electric smart #1. Smart's shift to an all-electric brand underscores the EV market's expansion:

In 2024, the number of EV vehicle sales is expected to hit 11.77 million and the number of charging stations around the world will surpass 2 million.

The autonomous driving market is also set to expand, with the number of driverless vehicles expected to increase from 31 million to 54 million by the end of 2024. This prediction comes as the technology for autonomous driving continues to improve. Mercedes, for example, is set to make history in 2024 as it rolls out the first-ever Level 3 autonomous system.



## Mobility-as-a-Service Market



As these technologies progress, government regulations will continue to impose restrictions on passenger vehicles. This year, [Stockholm](#) announced its plan to ban all gas- and diesel-powered cars from its city center beginning in 2025. Similar restrictions are in process or underway elsewhere as well, in places like [Amsterdam](#), [New York City](#), and California.

Restrictions like these, combined with consumers' desire for modes of transportation that are convenient and environmentally conscious, will set the stage for Mobility-as-a-Service (MaaS) to fill in the gaps. MaaS is hardly new, but as companies introduce more "micro-mobility" options—like bikes, e-bikes, and electric scooters—it's on track to reach [\\$347.6 billion](#) in 2024 and is expected to top [\\$822.8 billion](#) by 2032. According to McKinsey, this trend will lead to a 15% decline in passenger miles traveled in private cars by 2035.

Going forward, players in the auto industry will need to remember that—while this change will play out slowly, over the next 10 to 15 years—anticipating change by investing big in technological innovation will pay off in the long term. They will need to become more agile, tech-savvy, and data-driven to adapt and explore new digital-first, connected experiences, both inside and outside of the car.

For a lot of manufacturers, this means focusing on more immersive, personalized infotainment systems, new subscription-based models (even for things like [heated seats!](#)), advancements in charging technology, and better platforms to connect to charging stations. General Motors [appointed](#) Mike Abbott, a former Apple executive, to head its software unit and also said it would stop the use of Apple CarPlay or Android Auto on some electric vehicles in North America in favor of using Google's underlying technology for the infotainment displays.

Other leaders, such as Jim Rowan, CEO at Volvo, [acknowledge](#) that carmaker's infotainment systems can't compete with smartphones, so manufacturers should be looking to uncover recurring revenue outside the car just as much as inside the car.

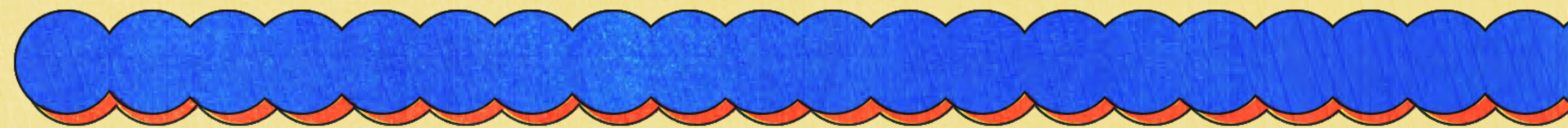
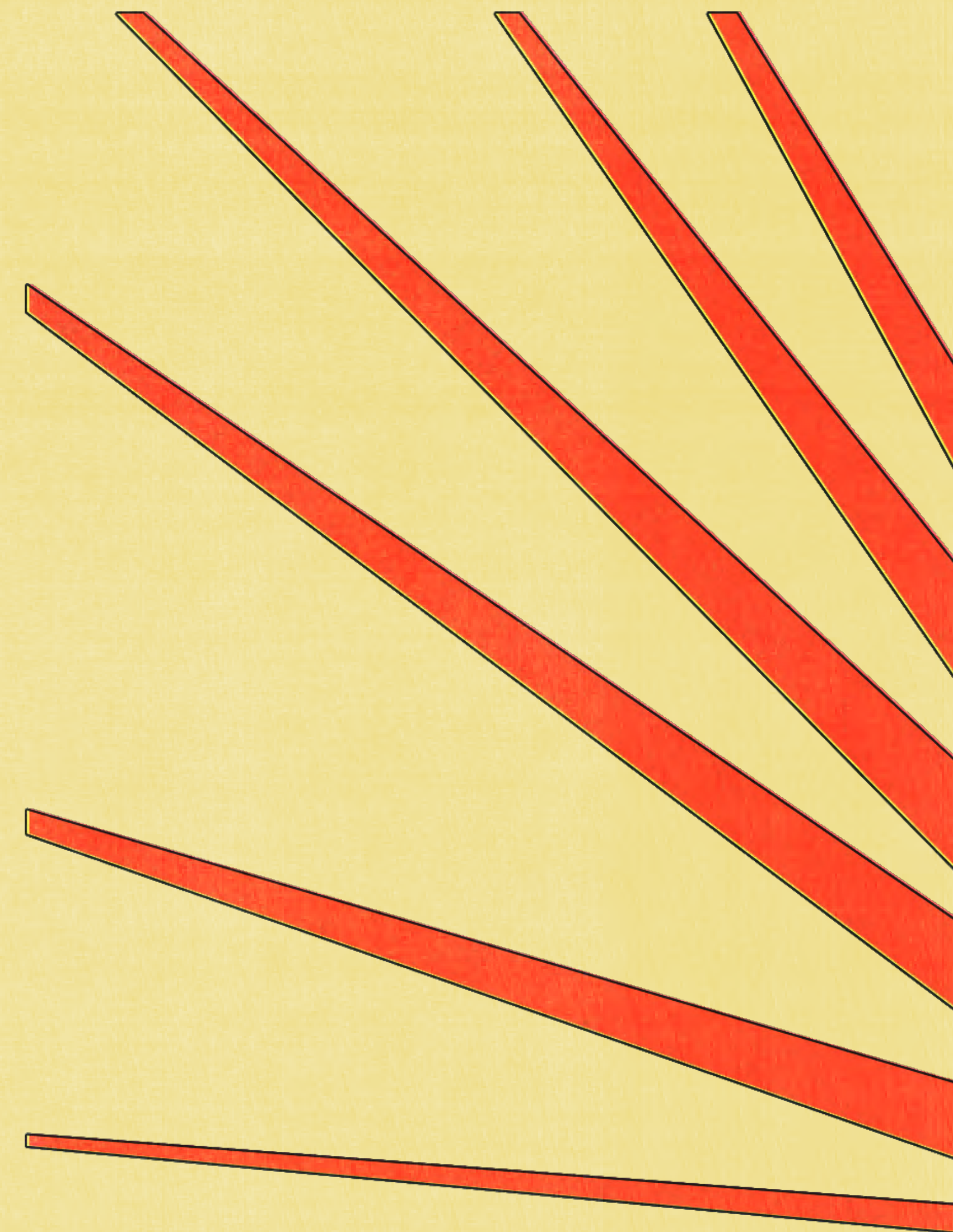
New revenue streams created from the data accrued by proprietary tech inside vehicles will become crucial to auto brands in fighting Uber, Lyft, and other MaaS companies for market share and consumer adoption.

No matter what, a shift towards more technology-led personalized experiences and marketing-centric, direct-to-consume models will enable automotive brands to better compete in an evolving consumer landscape.



Top: Mobility as a Service Market graph  
Bottom: Apple's CarPlay in a Volvo XC90. It might irritate carmakers to invest billions in EVs, only to find Tim Cook occupying the front seat

# 4.4 MITIGATING IMPACT WITH THE POWER OF INNOVATION



People believe, more than ever, that brands and businesses have the power to strengthen society and change the world for the better.

This year's annual [Edelman Trust Barometer](#) underscored feelings of pervasive uncertainty. Across the world, the report found people are losing trust in governments, are less optimistic about the economy, and feeling the effects of deepening societal divisions—but it wasn't all bad news.

For the third straight year, business increased its ethical score—becoming the only institution viewed as both competent and ethical.

A key component of this trend is undoubtedly the growth of environmental, social, and governance (ESG) initiatives, particularly since the COVID-19 pandemic.

Funding for sustainability initiatives [grew tenfold](#) between 2018 and 2020 to more than \$50 billion. Now, more than [90% of S&P 500 companies](#) publish annual ESG reports, also known as impact reports. B Lab's most recent Annual Report recorded its [fastest growth year ever](#), with more than 6,000 registered B Corporations—including DEPT®—and more than 200,000 businesses now registered with their Impact Assessment.

As with any trend, the ESG movement [has its critics](#). Some believe that it's just a fad or a PR stunt. Others argue that it's inherently flawed. But we're inclined to disagree.

2019

53%

2022

50%

2023

40%

### Economic optimism collapses

People now fear for their economic future without a trust safety net. Only 40% of respondents say they and their families will be better off in five years, a 10-point decline from 2022.

[Source](#)

Right: Photograph of people walking in nature

In 2024, people will continue to align themselves with brands and businesses dedicating resources to ESG initiatives. Not only that, according to [Thomson Reuters](#), investment in third-party services and digital solutions for ESG strategies is increasing rapidly—demonstrating how new digital innovations will add fuel to the fire.

Salesforce, for example, launched [Net Zero Cloud](#) last year to help brands measure and offset their carbon footprint and strategize emissions reduction by testing various scenarios. In many cases, digital solutions like this represent an upgrade from Excel-based data collection and other outdated processes.

Other service providers are also offering exciting recent innovations. The largest cloud providers—Microsoft Azure, AWS, and Google Cloud—have taken great strides to improve their energy efficiency and, as implementation partners, we're assisting in [helping brands reassess their architecture to build greener solutions](#).

Overall, the results of the Edelman Trust Barometer speak for themselves: People believe, more than ever, that businesses have the power to strengthen society and change the world for the better. As digital continues to advance, businesses will be better equipped than ever to deliver.



# 5 LOOKING AHEAD

## 01 IN OUR AI ERA

There's no doubt that the meteoric rise of AI has been one of the most disruptive events of 2023. Between the evolution of generative AI tools released just last year—like Midjourney, DALL-E, and ChatGPT—and the development of new ones, the bar for AI's capabilities within everything from immersive art to content creation just keeps getting higher and higher.

At the same time, opinions on AI remain divided and plenty of consumers feel uncertain about the technology's potential impacts on society. We've observed this in the global call for the regulation of AI, underscored during the Hollywood writer's strike and in the proposal for the European Union's AI Act.

Over the next year, we'll see AI start to change minds as its evolution gravitates toward both more responsible and more democratized applications. Innovations will improve transparency around the technology, integration in businesses will demonstrate its potential for productivity and personalization, and increased adoption will lead to AI becoming a hero for humans in the digital age.

## 02 MARKETING GETS PERSONAL — THIS TIME, FOR REAL

Today's consumers don't just want personalization—according to McKinsey, 71% of consumers expect personalization in their brand interactions. Moreover, 76% become frustrated when brands fail to deliver on that expectation.

We know that making stronger connections with your customers leads to loyalty. But, historically, "personalization" has been an empty buzzword for a strategy with no real methodology or infrastructure behind it.

With innovations like GenAI and machine learning, however, personalization is getting real. Marketers now have the tools they need to create meaningful experiences catered to each visitor. Consequently, 2024 will represent a pivotal year for marketing: as old playbooks change, marketers will need to adapt and follow the trajectory of Gen Z's preferences as they pioneer what's next.

## 03 WITH TECH AND DATA, THE FUTURE IS NOW

When it comes to technology and data, it's time to stop asking "what's next?" because, frankly, what's next is already here. AI might be hogging headlines but don't get it twisted: between quantum computing, 3D technology, AI-powered data modeling, and processing power, it's impossible to overstate just how future-forward the outlook for tech and data has become.

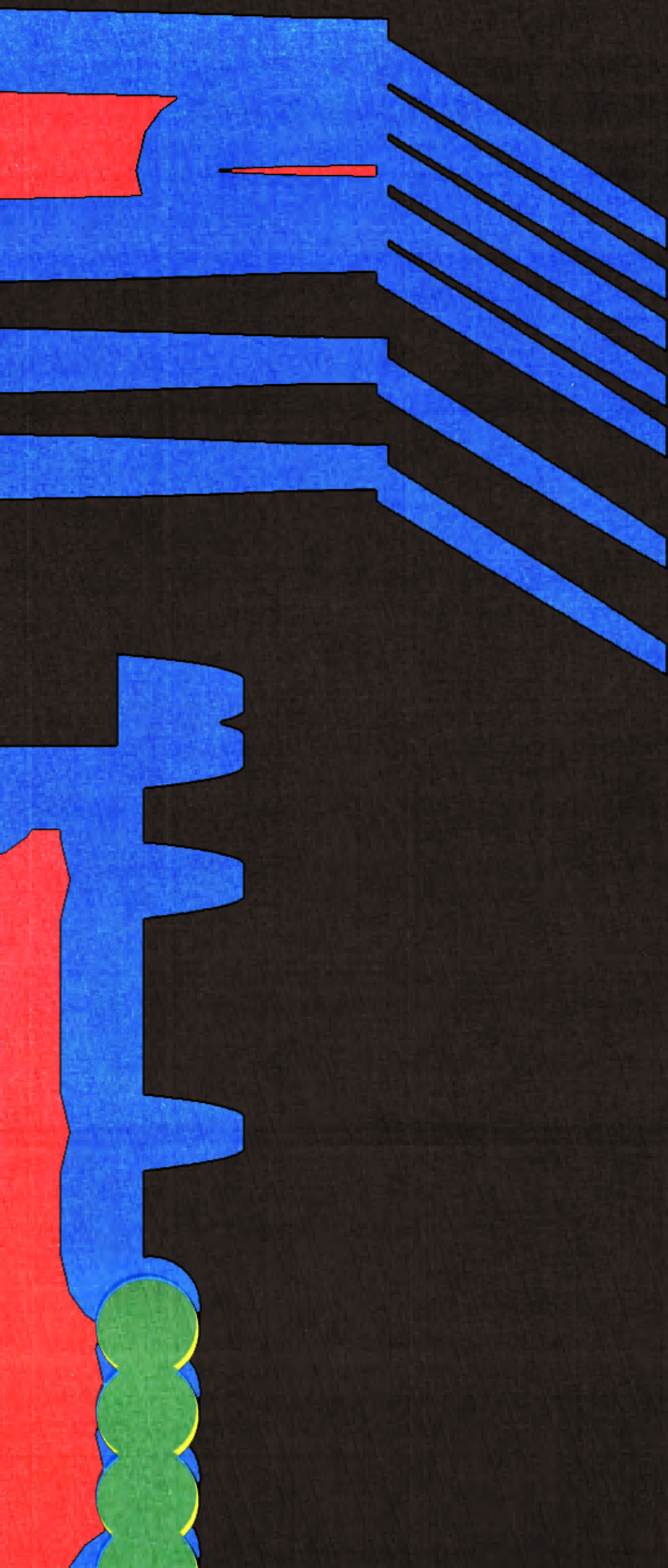
This past year, many brands opted to tighten budgets by playing it safe, focusing on tech debt and product enhancements. But 2024 will be all about going bigger and better with technology.

Brands must be ready to re-invest in innovation and data integration. Those who find success will earn the power to set a new standard for their industry for everything from customer experiences to customization to product offerings and speed.

## 04 PEOPLE AND THE PLANET

The message for people and the planet remains what it has been for years: we can do better. While there's no silver bullet solution for solving climate change or the mental health crisis, technological advancements—combined with consumers' desire for activism, accessibility, and sustainability—will create new business opportunities to drive meaningful change in 2024.

In the past, we've seen some businesses establish themselves as highly trusted ethical leaders, shaping societal impact. This illustrates a shift in mindset in both business and society and a collective desire for meaningful transformation. To succeed in this endeavor, collaboration is crucial—requiring not just unity but a holistic approach beyond consumption—and looking at broader shifts within every aspect of our culture and society.



We hope you enjoyed exploring the biggest trends across culture, creative, digital marketing, AI, and tech that will define the year ahead.

Digital will continue to be the driving force helping brands and businesses move the world forward.

We hope that you're as eager as we are to embrace what's next.

For more information, or if you have any questions, please contact us:

[hello@deptagency.com](mailto:hello@deptagency.com)  
[www.deptagency.com](http://www.deptagency.com)

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2024 Trends Forecast:  
Connection, Creativity & Culture

# TRENDS FORECAST '24

