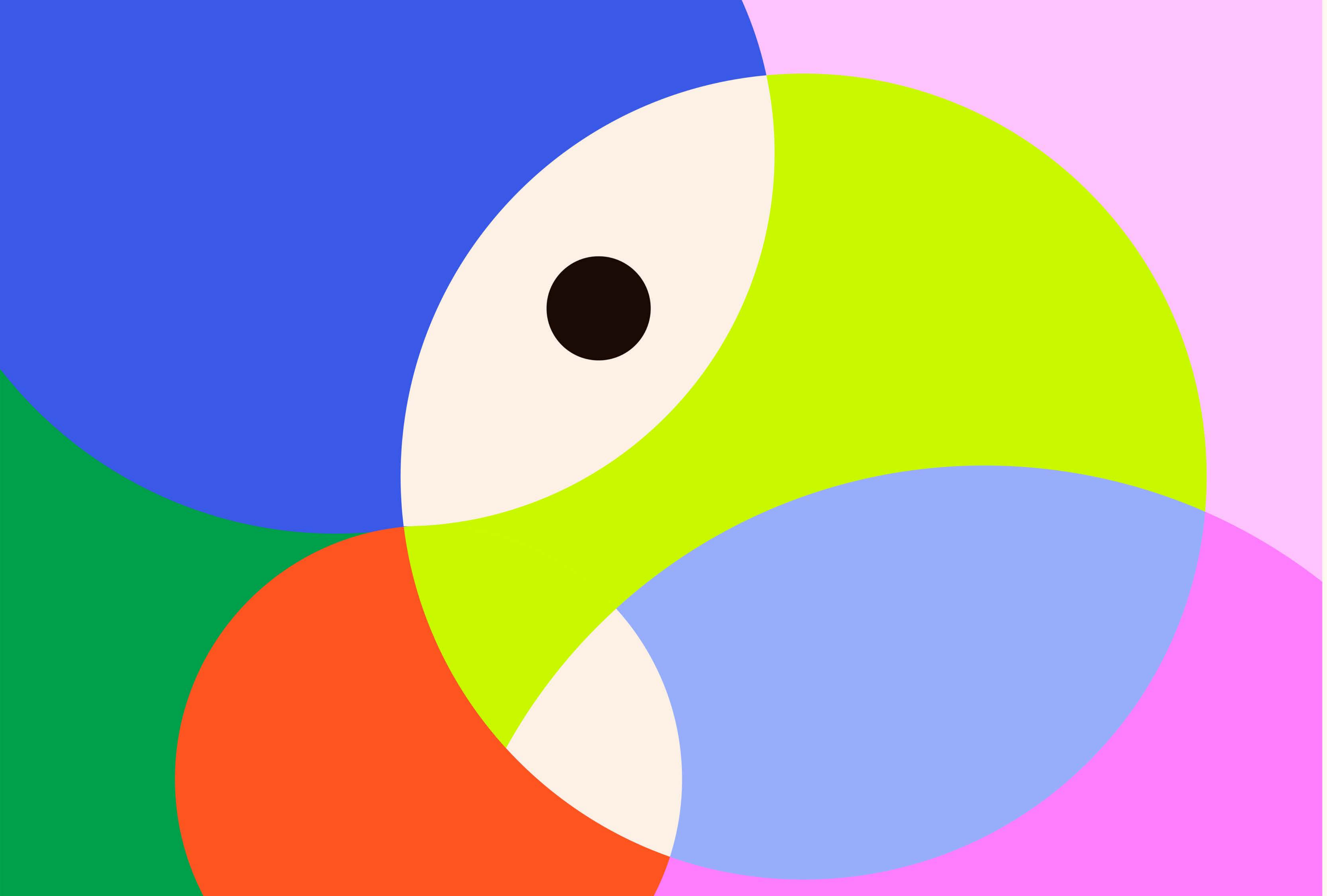


TRENDS 2023

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CLASS OF 2023

If we have learned something from the past year, it is that we live in a world where we are all inevitably connected. Russia's invasion of Ukraine ended up leaving 800 million people without food security, skyrocketing inflation in countries that had not had this problem in decades, and putting on the table fears of a global recession that would leave many unemployed.

The new year began with expectations about what would be the best way to end the war in Ukraine to prevent other powers from wanting to resolve their territorial ambitions as Russia has. Around the world, we will continue to see polarization, although citizens have started to show signs of fatigue in relation to those politicians who want to corner them to one side of the spectrum. The discussion between authoritarianism and democracy will continue to accompany us across all geographies.

Almost all of the trends we presented for 2022 remain relevant in some way, because many of those behaviors that were born during the pandemic have stayed with us, particularly in the way we work, consume, and engage. But 2023 is the first year we can look at the pandemic from a healthy distance despite being aware that the virus lingers. The same goes for uncertainty. We already know that we have to get used to it being with us permanently.

I hope reading this document is inspiring. There are many opportunities in this new year. Many spaces to understand and empathize with the consumer. Many resources and tools to create amazing brand experiences. My best wishes to make it a year full of inspiration.

01

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01

HUNGER FOR STRENGTH

Last year, we talked about Authoritarian Aggression as the first trend. We clearly saw the example of authoritarianism in Russia, China, and in those countries where democracy deteriorated significantly. There is an increasing number of citizens who ask for or support governments whose base is strength. 2022 may have given us some samples that political polarization was starting to ease, but there are still many countries where it is impossible to debate, discuss, or reach an agreement.

Recently, famous Korean philosopher Byung-Chul Han published a book called Infocracy, arguing that the democracy crisis is occurring in the way public opinion is formed today from bots, trolls, and misinformation on social media. The mobilization of voters based on rage or outrage has spread throughout the world in every electoral process. While most of the planet continues to rely on the democratic system, it seems as if there is a lot of hunger for the authoritarian rhetoric and the fact that rulers can act without having to rely on other powers.

In the latest Global Securities Study measure, 23% of Americans said that “having a strong leader who does not have to bother with parliament or elections” was seen as the ideal system of governance. The IDEA Institute for Democracy concluded in its 2022 report that 46% of the world’s democracies are moderately or severely contracting. A couple of decades ago, the number did not reach 20%. Many rulers are hungry for authoritarianism, and citizens, who in many cases see their countries swamped in turmoil and chaos, seem willing to give it to them. 2023, with prospects for a global economic recession, may increase that desire for authoritarianism as a result of uncertainty and despair.

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The Age of the Strong Man, according to the title of the book by journalist Gideon Rachman, published in the year that just ended, tells us that we will continue to live with leaders who will seek to impose the decisions that, in liberal democracies, should correspond only to the individual. They will continue to look to implement their ideology in schools and control access to information, including censoring certain conversations or images of dissent, as we recently saw in China. Hunger for strength also comes from business decisions that cannot now be neutral, as has happened with Twitter recently. In 2023, we could see entrepreneurs entering politics and more private companies expressing their discomfort with certain government decisions.

It is a year of measuring forces. We will know how hungry citizens are to continue supporting authoritative regimes, often at the expense of development and economic stability. In the different analyses of how the war could end in Ukraine, one of the critical factors will be the role that Russian citizens, as well as the International Community, play in preventing similar situations, such as China's with Taiwan, for example.

The world of 2023 is a world where force faces democracy and, for the time being, it appears that there is a large segment of citizens who seem to validate that force with great vehemence, often times through a democratic process.

FOR BRANDS: A businessman who wants to be neutral on political and social issues is an endangered species. Today, he is under pressure from investors, employees, and consumers to take a stand, whether on one side or another of the political spectrum: Chick-Fil-A, for example, one of the fastest growing fast food chains in the United States, advocates religious values

and positions, while Disney opposes the laws of Governor DeSantis in Florida. So, there is no option for brands. The important thing is to listen to investors, employees, and consumers; and with clarity that it will surely be impossible to keep everyone happy, to ensure that their position on political issues is consistent with the brand strategy.

02

EVASIVE DISSATISFACTION

Last year, the press around the world echoed the trend called ‘quiet quitting’ that revealed an employee who is fed up to the point of simply making as little effort as possible. But, beyond the impact in the workplace, we are seeing citizens who are apathetic to reality, exhausted, and dissatisfied in general. Even on topics like the environment, the battle is already lost for many. The volatile, uncertain, complex, and ambiguous reality that we have talked so much about and that we could call ‘permacrisis,’ today seems to have completely stolen motivation from citizens.

According to the Collins dictionary, ‘permacrisis’ was the word of the year that just ended, defined as an extended period of instability and insecurity. The economic crisis that has followed the pandemic, as well as the expectation of a recession that could be experienced with great intensity in some countries, makes the concept of a better future, which has been a universal motivator, fail to move citizens.

We are faced with a generation who feels that crises are linked. LSN Global talks about the ‘Paralysis Paradox’ that makes citizens prefer not to act on events that would have mobilized them before, but in the face of which they now feel they have no energy or hope. We are faced with crisis fatigue, which makes the way people live today their new normal.

This apathy, which is mainly experienced among younger people, appears very intensely in China. The phenomenon called ‘bai lan’ (letting it rot), which some look at as the reaction to a hyper-competitive society, makes young people simply let life pass by. This can be very much related to the fact that current events generate less and less interest.

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Global Web Index talks about news fatigue. In the past two years, the television genres that have fallen most in interest for Americans were talk shows (-12), news and current events shows (-11), business shows (-10), and political shows (-10). The environmental subject, which we have always seen as a great motivator for younger generations, seems to have lost the ability to attract. While citizens are aware that global warming continues to grow alarmingly, the level of concern has stalled.

Very much in tune with this dissatisfaction with life, there is a desire to abandon or reduce the time spent on work. Although economically unfeasible, according to recent research by The New York Times, millennials wish to retire by the age of 50. In this context, we may see citizens who may be content living life with fewer amenities, with less of an effort.

Several experiments have been conducted in various geographies to explore a four-day workweek, the most recent in the UK, yielding partial results that are very satisfactory for both employees and employers.

The pandemic left us with the inheritance of citizens who approach life very differently than previous generations did. In a recent Mintel study, 64% of US Gen Z teens agree that they feel they have lost two years of their lives because of the COVID-19 pandemic. This may spark an interest in recovering the lost time, but not through effort or seeking opportunities, but rather passively and hopelessly. So, it seems like the best option is to get away from life.

FOR BRANDS: Brands have great opportunities with citizens who may feel overwhelmed by the crisis and be dissatisfied with many issues. It would be very helpful to demonstrate that the impact is real in things like the fight against global warming, for example, or with optimistic messages, with substance and support, that can help restore faith in a better future. It is curious

that, in many cases, brands today have to maintain motivation among their employees and in their consumers at the same time. Thinking that they are two audiences with many things in common, with a natural connection and empathy, can be a good start to regain citizens' interest in proposing, building, and undertaking.

03

PROFITABLE SUSTAINABILITY

If, at any time, we felt that the sustainability of the planet and capitalism could be at odds, 2023 will show us that they can coexist in a very friendly way. After years when companies had to adapt processes and visions to align with consumers' environmental struggles, many today see caring for the environment as a business opportunity. Consumers, for their part, will be critical and vigilant about the real impact of the social commitment of brands.

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Blackrock CEO Larry Fink has been one of the leaders who has spoken most about stakeholder capitalism and the social commitment of brands. He recently said that it is not about politics. It is not a social or ideological agenda. Instead, he recalled that capitalism works because it is mutually beneficial to employees, customers, suppliers, and communities. In a recent interview for Time magazine about a venture with which he wants to democratize access to medicines, Mark Cuban defined capitalism as a system that is about finding solutions to problems. Some will say that capitalism has the ability to adapt and that it will never ignore the importance of generating short-term profits. However, it is interesting to review the perspective that consumer issues, inclusion, or global warming end up being opportunities for capitalism.

A year ago, we talked about the circular economy and how brands are now responsible, not only for selling products, but for their final disposal. Recently, luxury brand conglomerate LVMH announced that it will offer garment repair services to extend their lifespan. A number of brand initiatives, both low-cost and luxury, have announced alternatives to reduce waste, from garment rental to repair or resale.

The famous British department store Selfridges recently announced that, by 2030, half of its revenue will come from recycling, reselling, or repairing garments. This is possibly the best proof that environmental engagement can be a real source of business.

Now, the recession announced for 2023 will accentuate inequalities and will keep criticism of traditional capitalism present. Political dissatisfaction, even with democracy as a system, will truly express the frustration of those who see economic growth options further away. Consumers' critical attitude will also materialize with any action that sounds like 'green washing' or that falls short in the face of a world where the natural phenomena associated with global warming continue to rise in volume. 65% of citizens

in the world think that in 2023 there will be more extreme weather events in their countries, and 57% say the new year will be the hottest year on record.

We will understand sustainability less and less as an issue exclusively of caring for the planet, expanding to the ability of brands to offer solutions for people's lives that are friendly to their new economic, social, and, obviously, environmental reality. Barilla, the Italian pasta brand, recently announced the launch of its passive cooker, a device that can reduce carbon emissions by up to 80% and, thus, energy consumption costs. We will continue to see the rise of apps and devices that help us save energy and money through a vision where design understands the concept of sustainability in the broadest way, generating benefits for all.

FOR BRANDS: The trend of profitable sustainability is a good example of brands that understand changes in consumer priorities and adjust to address them, without losing sight of the business. It is the same thing that will have to happen with the recession. Consumers will seek not to lose those little luxuries that they have added to their lives. The brands that help them keep them will have a special place in their hearts.

The best example is Netflix, which, with consumers starting to trim these types of services, offers a subscription alternative at a lower price, including four to five minutes of ads for every hour of content. Tools that help consumers achieve more with their money will also be greatly appreciated, given the budget constraints citizens will have.

04

POWER TO THE UNDERDOGS

It is the time to shine for everyone who was always underestimated and had a historical leader shadowing them. From the geopolitical shift of India's leadership as the world's most populous country, to Ukraine, which proved that it was possible to confront fearsome Russia. It is time for those behind the scenes to shine, make money, and prove that the sun can also set on traditional leadership.

Some may see it as a minor detail, but India's 2023 status as the world's most populous country can mean a very relevant geopolitical transformation. For centuries, China has been the country with the largest population and, over the past two decades, has had the world admiring its progress. While China's economy is nearly six times larger today, India could start gaining ground on its neighbor, with whom it has multiple territorial conflicts today. We will hear much more from India, a country the world associates with meditation or yoga, and very little with its other profile as a nuclear power with political, religious, racial, and territorial conflicts. According to Kantar, India ranks number two on funded unicorns and number one in soon-to-be unicorns.

The fact that Ukraine has so far achieved so many victories in its defense against Russia is an inspiration for the world's underdogs. The United States offered Zelensky an airplane to get him out of Ukraine alive early last year. Months later, he was the person of the year for Time magazine due to having mobilized almost the entire planet in favor of his country. He himself, a former comedian without any political experience, is proof that the underdogs have influence never seen until today.

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However, beyond geopolitics, the underdogs' moment is being experienced in many other areas. The rise of the so-called Web3 based on decentralization, where there are no owners or conglomerates, but rather it is the creator who exercises power and takes most of the profits, is an example of this. Beyond the stumbles of cryptocurrencies and NFTs in 2022, many agree that their future is tied to transactionality and utility. This has a lot to do with the creators being able to be the real beneficiaries. Ideas like Clara, an app designed to help content creators address pay disparities and to get fair pay from the brands, also points in the same direction.

Some startups today compete against the giants Google or Apple. The You.com search engine that had a \$25 million capital injection may be the David capable of facing the Goliath Google.

The revenue of phone manufacturer Nothing increased tenfold in 2022, and now it aims to enter the U.S. market to compete with Apple and Samsung.

Finally, as part of the emergence of labor unions at companies like Amazon or Starbucks, it is worth remembering how we have been seeing consumers' interest in giving relevance to how companies treat their employees as a key factor in choosing a brand. Those who, until yesterday, were the underdogs, are now more relevant to citizens and to the consumer than the business owner himself. According to a Gallup study of last September, 68% percent of Americans approve labor unions, the highest rate since 1965.

FOR BRANDS: Brands will need to rethink their brand strategies from the concept of decentralization, a key component on the Web3. Decentralization means users gain power, because there are no owners who control decisions. Obviously, we know this is not feasible for the vast majority of brands. What is feasible is to rethink the role of marketing and

see themselves as coordinators and not controllers of what happens to them. Decentralization and autonomy are not about consumers generating content for the brand. It is so much more than that. It is allowing them to decide on the future of the brand. It is putting them in the driver's seat in building the experience.

05

OPEN HEART

The sense of care and awareness of our own emotions has a lot to do with the fact that, today, we are a society that values our emotional side much more. New concepts such as emotional regulation and emotional competencies become essential criteria when recruiting new talent. Rational thinking, which has been so relevant in the past, has fallen short in helping us explain and understand the post-pandemic world.

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Searches of people on Google over the past year show the importance of mental health and emotional management. Over the past decade, searches for concepts associated with ‘thinking’ have lagged behind with respect to the searches of those related to ‘feeling.’ In particular, searches related to the power of emotions doubled in the past year. We have never studied our emotions this much. And while we have been predicting their power to drive behavior change for decades, it now seems to permeate in a very meaningful way in many other areas. Spanish philosopher José Antonio Marina recently published a book called *El Deseo Interminable* [The Endless Desire], a new history of humanity told based on emotions as the essential engine of the development of societies.

For several years, Professor Mark Brackett, from Yale University, author of the book *Permission to Feel*, has insisted on taking emotions very seriously. In a recent interview for the Finding Mastery portal, he recalled that “Emotions are the drivers of our attention, our learning, our decisions, our relationships, our health, and our performance.”

Lego recently launched an initiative called Building Big Feelings, which allows children to use game pieces to express their emotions, considering age-appropriate vocabulary limitations, making this popular game a form of therapeutic expression.

In 2023, we will discuss the importance of emotional regulation, which is about the ability to be able to control your own emotional state to reduce anxiety, or overcoming the sense of fear or sadness. Emotional intelligence has long been discussed as an essential factor for leadership. The conversation about emotional competencies that enable empathetic relationships at work is growing. Over the past year, we have seen dozens of celebrities and personalities reveal their mental health issues and recognize their vulnerability. It is a world that talks about feelings with increasing openness. The New York Times recently opened

a conversation with teens to ask them about their vision of celebrities who decide to openly discuss this topic. The result was overwhelmingly positive.

This emotional movement also has much to do with recognizing the power of fun. One of the three most viewed TED Talks in 2022 was Catherine Price's on the impact of fun on a healthier life. Her book *The Power of Fun* shows that it is critical to building resilience, happiness, and mental and physical health. LSN Global talks to us about *The Awe Economy*. Those moments of surprise can be essential to making people live more intensely in the present. According to this trend portal, this can have a real impact on well-being and awaken the sense of transcendence. It is a time to live, experience, and express emotions. 2023 is a year to live with an open heart.

FOR BRANDS: Much of the past decade has seen brands worry about being associated with causes that have to do with minorities, the environment, or the development of society. This is not a trend, as consumers value and claim that commitment. However, what we may have started to see is that there is an opportunity to develop a

competitive advantage based on fun. Many voices in creative industries today ask brands to bring joy and fun back to their advertising and the brand experiences that they design. It is a way to make consumers happier on a daily basis and connect directly with their hearts.

06

NEW CITY

We have been talking about reconfiguring cities for years, but the pandemic accelerated the transformation of private and public spaces and has made us rethink mobility. We are seeing the emergence of new cities where advances in artificial intelligence and electric mobility begin to give them a new look. New spaces emerge and others are reinvented so that they do not disappear.

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Some estimates suggest that more than 23 million people in the United States will have moved as a result of the changes brought by the pandemic. Professor and urbanist Richard Florida says COVID-19 was the most transformative event that America has experienced since the great migration to the suburbs after World War II. The fact that more than half of offices have failed to bring back employees creates a cascading effect that affects restaurants, social life, and the informal economy.

City centers have begun to be empty. This new configuration has a lot to do with what some have called the “donut effect,” because people have stopped prioritizing proximity to offices as an important factor in establishing their residence and, on the other hand, they give more importance to having a comfortable space in which to work as well. In the past two years, the centers of the top 12 metropolitan areas in the United States have lost 8% of their population.

While many commercial and entertainment spaces have regained clientele, offices remain empty. Many companies have tried to offer all kinds of benefits. However, nothing seems enough to attract employees back.

According to a Microsoft study, 87% of employees think they are just as productive working from home. Employers, for their part, seem to not share this idea and, in many cases, have implemented hybrid models. This also creates a new concept: what the British call “TWaTs”, employees who only come to the office Tuesday, Wednesday, and Thursday. Cities live differently with traffic-free Mondays and bars near offices are full on Thursday nights.

On the mobility front, city skies can also start to look new: taxi experiments had begun since before the pandemic that, like drones, could carry passengers on short trips. Volkswagen recently introduced a prototype flying taxi that could carry up to four passengers on urban routes.

Amazon recently announced that it began delivering orders using drones in California and Texas. Although they are still tests in small cities, it could soon happen in large cities as well. Online shopping has caused commercial spaces to be reconfigured, some with smaller formats to serve more specific population groups, or to deliver online orders to the store (curbside pickup), a practice that had its rise in the pandemic and has been maintained.

The use of commercial spaces, workspaces, and fun spaces is changing. Some of the time people spent commuting to work is being spent on fun, both inside and outside of the home. It is part of life in this new city that, even though we have been living in it for years, we will begin to experience it in a renewed way.

FOR BRANDS: The change we have experienced with city reconfiguration has provided us with unprecedented geographic freedom. Brands have the opportunity to reshape the user experience from freedom, designing physical, virtual, and mixed spaces so that people can access products and services when and how it best fits their lives. We have seen many brands

transforming transactional spaces into experience spaces. The most recent case is the Dior Gallery, a museum dedicated to the history of this haute couture brand, which opened last year in Paris. Here is one more example of physical spaces dedicated to content creation that prioritize sensory experiences over business.

07

SPEAKING IN TIKTOK

Apart from being the world's fastest growing social network, TikTok has created a language and culture that all networks follow. However, its influence goes far beyond the world of content because TikTok, with its algorithm, has made many discover the importance of anticipating their consumers' tastes. TikTok's formats, dynamics, and hyper-customization have transformed the music, marketing and political industry, and perhaps the video game industry as well.

The United States, as India has already done, may ban the use of TikTok. Despite all the criticism, it is the fastest growing network in the world. While it has been in the middle of controversy over China's access to people's data for years, its algorithm continues to capture thousands of new users every day, who view it as entertainment or as an escape from reality.

TikTok created a culture, a style of relating to people, and a way to connect to content. Many of the most commonly used phrases in TikTok have become part of users' everyday language, and a more friendly search space than Google itself can be for many. In fact, last August, TikTok announced that it was testing a new system to facilitate searches on its platform. Also in August, it announced that it would start a pilot including mini-games within the platform.

TikTok has also changed the way we are informed. While news consumption has declined in all formats, both traditional and digital, TikTok appears to have become the space where people today learn about the news. According to a Pew Research

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Center study, one in three TikTok users in the United States say that is the place to get the news. Today, TikTok could be much more influential than Facebook was in the 2016 U.S. election.

Thanks to Netflix and TikTok algorithms, among others, users today expect content to be ahead of their interests. Last year, Amazon announced that Alexa would become more proactive and not just reactive. Based on the concept of “ambient intelligence,” Alexa will not only continue to be able to help out with a task, but also will know when to step in. Companies’ effort to collect and increase customer first-party data is the result of that expectation of proactivity.

The space in which TikTok has gained the most influence is in e-commerce. According to a study

published by The Drum, 67% of TikTok users say the platform introduced them to products they’d never thought of before. All of this, in large part thanks to a language in which advertising and products become an organic part of the content.

That is why it may no longer be feasible to ban TikTok, and in some other way, other social media have already captured much of the features that made it so influential. TikTok has made us live differently, talk differently, look differently, play differently, and consume differently. It has made us have another kind of connection to brands and communities. In 2023, we will live in this world where we speak the language taught to us by TikTok.

FOR BRANDS: In recent years, we have discussed how brands can be successful on TikTok. Platform sales reps always remember that their motto is “Do not make ads. Make TikToks,” as a way to prevent brands from entering with intrusive ads that disrupt the experience and instead try to build organic communication. The brands that are most relevant to TikTok have been those that are able to put content before a business purpose and prioritize authenticity. TikTok will need to be on the map of brands that

want to be relevant to culture today. The secret to success will go through its ability to be authentic. In this regard, it is worth keeping an eye on BeReal, an application that could continue to be influential in 2023. Cases such as FWB (Friends With Benefits), a decentralized autonomous community of creators based on the benefits of Web3, that could act as a marketing agency helping brands create tailored communities, are also worth reviewing.

08

HUMACHINE

In the relationship with artificial intelligence or the metaverse, we will continue to have mixed feelings. While many of the advances surprise us and excite us, they also continue to make the threat to human interaction or job elimination clear. We truly wonder where the human ends and where the machine begins, which has a lot to do with the question of where the person ends and where the avatar starts.

In November 2022, the use of ChatGPT spread like wildfire worldwide. The free chatbot generated by OpenAI, the creator of a language model that received \$1 billion of investment from Microsoft in 2019, enables natural conversation, generates text, and answers questions naturally. Those who ask it to write letters, songs, or write messages are surprised by the accuracy, relevance, and fluency of texts in various languages. The same viral effect occurred with Lensa, an application that uses artificial intelligence to turn a person's photos into avatars, with themes like pop art or anime. We are living the rise of a consumer who wants to explore how far artificial intelligence can go and how it can impact people.

If an application is capable of generating images or writing texts, it is inevitable to think how much it would take to be able to write a trend report like this. The topic of jobs that may be threatened will continue to be part of the conversation of unstoppable technology. Kim Povlsen, president of Universal Robots, says fear of robots does not make sense because what automation will do is create a new class of jobs, which require more technological knowledge and problem-solving skills.

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However, the discussion about the value of artificial intelligence to complement rather than replace people (human-centric) will continue to be on the table.

The human question is also present in the metaverse. Tom Sandage, editor of The Economist, believes that 2023 will be the proof of reality for the concept of the metaverse. He said at a recent conference that, just as Meta made the avatars have legs in its Horizon app, it is worth asking (metaphorically) whether, in 2023, the very concept of metaverse will also have legs, and we will see it finally take off. Bloomberg said last May that Apple presented advances to its board of directors on a device that combines virtual reality and augmented reality, which would launch this year. This could represent a revolutionary change in the very definition of virtual spaces for common citizens.

And, in that symbiotic relationship between man and machine, between person and avatar, we will see implications that will become increasingly important to people's lives. According to the Global Web Index, 47% of Roblox and Fortnite players see in the avatars the possibility of expressing themselves in a different way, and 31% confess that they feel more comfortable in a different identity or persona. In this sense, it is worth mentioning the case of the video game The Sims, where users can choose the sexual orientation of their avatar. In this 'humachine' world, we will hear about mixed reality that goes beyond augmented reality by making the synthetic content and the real-world content react to each other in real time.

FOR BRANDS: Last October, Amazon announced that the project to develop delivery robots was canceled because it did not meet customers' demands. Uber, on the other hand, reported that it will launch its autonomous car service in 2023. They looked like announcements that are at odds. Actually, the question of man or machine leadership does not make sense today. Brands should

maximize spaces where both machine and man add more value with a view to improving user experience. There are spaces and times when human connection, knowledge, and common sense cannot be replaced by the machine, at least for now. Instead, there are other opportunities where the speed, accuracy, or dedication of the machine makes it the best choice.

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Reports from previous years since 2010 are available on www.slideshare.net/juanisaza

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SOURCES

The compilation of trends included here is the result of capturing, filtering and evaluation of many sources. Among them worth mentioning:

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