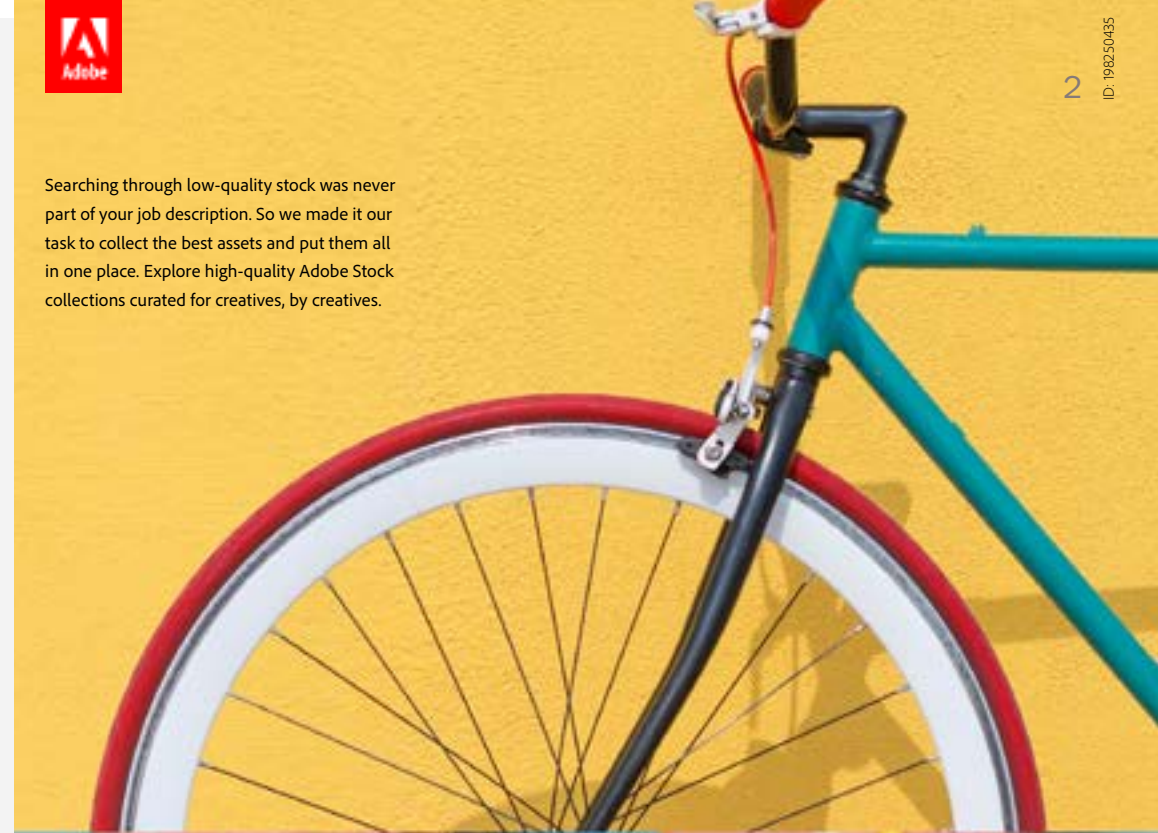


D&AD Insight Report 2019





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Welcome to the D&AD Insight Report 2019



Each year the D&AD Awards gathers over 250 world-leading designers, advertising minds and skilled creatives to cast their eye over 25,000 pieces of work submitted from around the world. But the result of it all isn't just Yellow Pencils. We capture the discussion, debate and views of these 250 creative minds, and look at what it means for you and the work you produce.

Out of this emerged three themes that provide an influential backdrop to the work produced. They reveal how the most powerful work taps into the needs, desires, frustrations and aspirations of society, and fulfils the basic needs of humans across the world.

We also see the creative opportunities within each one constantly evolving. These are shaped by the political, societal and cultural experiences of humans, and how creatives are responding to them.

This report is not a crystal ball in to the future. Instead it is about identifying key themes that have influenced creative excellence, the impact trends are having on our industry and the powerful opportunities that these themes present for you.

What is Human?

Defining and normalising what makes us 'us'. From our exercise and eating habits, to our minds, bodies and souls, we are constantly being shaped by global trends and cultural factors. In recent years, creative work has challenged what it means to be human. We wrote about this last year in our 'Redefining Humanity' section. As we augment our brains and bodies with technology, improve our performance and tackle inequality, we're gradually becoming super-human.

The work this year takes another tack. This time we're focusing on our drive to be the best version of ourselves. We're looking at creative solutions that reflect a more honest conversation.

Fractured Society

The world is still in a state of flux. We have political tension, economic disruption and social unrest. In the last report we dug deep into this topic. In the wake of Trump, Brexit, Duterte in the Philippines, Maduro in Venezuela, and many more, we saw brands responding with creative work that either picked a side and shouted an opinion, or kept out of the fray.

Sadly, in 2019, these social issues don't appear to be going away any time soon. Instead, the void between society and politics feels like a growing chasm. Brands are continuing to pick sides and creatively push this agenda to the world. But some of them are also offering escapism to ease the tension and returning to brave, bold and humorous work that offers a little relief and some welcome distraction.

Access All Areas

Digital channels are continuing to change the way people access information. The constant introduction of new channels and the continual evolution of the old ones are opening up opportunities that were never before possible. This is particularly felt in the advertising industry, where capturing people's shrinking attention spans is still the number one aim.

This year, the work our judges saw revealed some new and exciting ways of capturing attention with creative uses of technology; most notably the use of highly-crafted AI approaches.



What is Human?



Whether for health reasons, self-improvement or just for show, the health and wellness focus of the past decade is still growing. Evolving from fad diets and fitness routines, to gym-selfies, clean eating and protein-powered Instagram stories, the fitness push is here to stay.

In 2016, the global wellness industry was worth \$3 trillion, three times bigger than the worldwide pharmaceutical industry. In 2017, it reached \$4.2 trillion.

Global Wellness Institute, 2018

For brands, this is a popular route to take. Over the past few years we've seen a shift away from campaigns built around iconic hero imagery to more holistic and honest approaches, including normalising anatomy in all its forms and considering health beyond the physical.

In 2019, health still takes centre stage. Wearable technology continues to move into the mainstream, and we're now combining fitness with health, wellbeing and entertainment. An endless stream of new products has resulted in wearables that monitor our rest as much as our activity, watches that allow us to reduce our body temperature and even waistbands to stop snoring.

As this movement shifts from physical wellness to mental health, brands have stepped in to help customers improve their peace of mind and give them

a moment to disconnect. Ikea has been giving people the tingles with its ASMR advert while KFC has embraced mindfulness. There have also been wellness initiatives embedded into everyday activities, such as the Tokyo Metro playing 'healing' music to stressed commuters and Virgin Australia offering meditation to calm nervous passengers.

YouTube saw a 70% increase in people watching relaxing videos in the year running up to June 2018.

Google, 2018

Tech companies are also responding with their own initiatives. Following reports that showed how social media can have a negative impact on mental health, in May 2018 Instagram and Facebook announced their 'Time Spent' feature to help users track – and hopefully reduce – their usage. The following month Apple introduced a feature that helps users keep track of their screen time.

While some use tech to help them switch off, it is still being put to use providing help and assistance. Instagram added an 'alt text' feature, allowing people to add photo descriptions that can be recognised and read aloud by screen readers for those with visual impairments to hear. Samsung recently unveiled Bot Care, a knee-high robot capable of monitoring medication and sleep, offering exercise tips, and contacting caregivers and the emergency services.

But, when it comes to health and wellness, initiatives shouldn't just focus on customers. In 2015, Microsoft changed its policy to help address health and wellbeing amongst suppliers. It did this by making a commitment to only do business with organisations that provided paid time off to their employees. This is an important initiative because under US law paid leave isn't mandatory. In 2018 the brand extended its policy even further to demand that suppliers offer 12 weeks paid leave for new parents. Microsoft's general counsel, Dev Stahlkopf, commented that "we understand this may increase our costs, and we think that's well worth the price". This is an indication that some companies are understanding that the most important returns aren't always financial.

Why Care?

Exploring what it means to be human and being the best you can be are two aspects of life that show no signs of slowing.

However, as Microsoft shows, this trend can't be limited to creative output. Creative businesses also need to look at the way they produce work, and embrace the movement in their own workplace.

More companies are seeing the importance of putting purpose alongside profit and are introducing life-changing policies that improve the health and wellness of both customers and employees. However, the creative industries have some catching up to do. 60% of employees in the industry* say that their job has had a negative impact on their wellbeing in the last year. Some businesses are further ahead than others in addressing this.

Publicis Media UK is introducing flexible working when it moves to its new offices in 2019. It will no longer require staff to clock in and out, instead allowing them to work different hours and from locations that allow them to be more productive.

And animation studio Aardman has another approach to hold onto talented staff. It's handed full ownership of the company over to its employees, hoping to give staff more of a sense of purpose.

These policies are the result of an industry in flux. But it's vital that every employer works to improve the wellness and wellbeing of their staff. So, ask yourself and your clients how you can address these issues on a community, country or even global level.

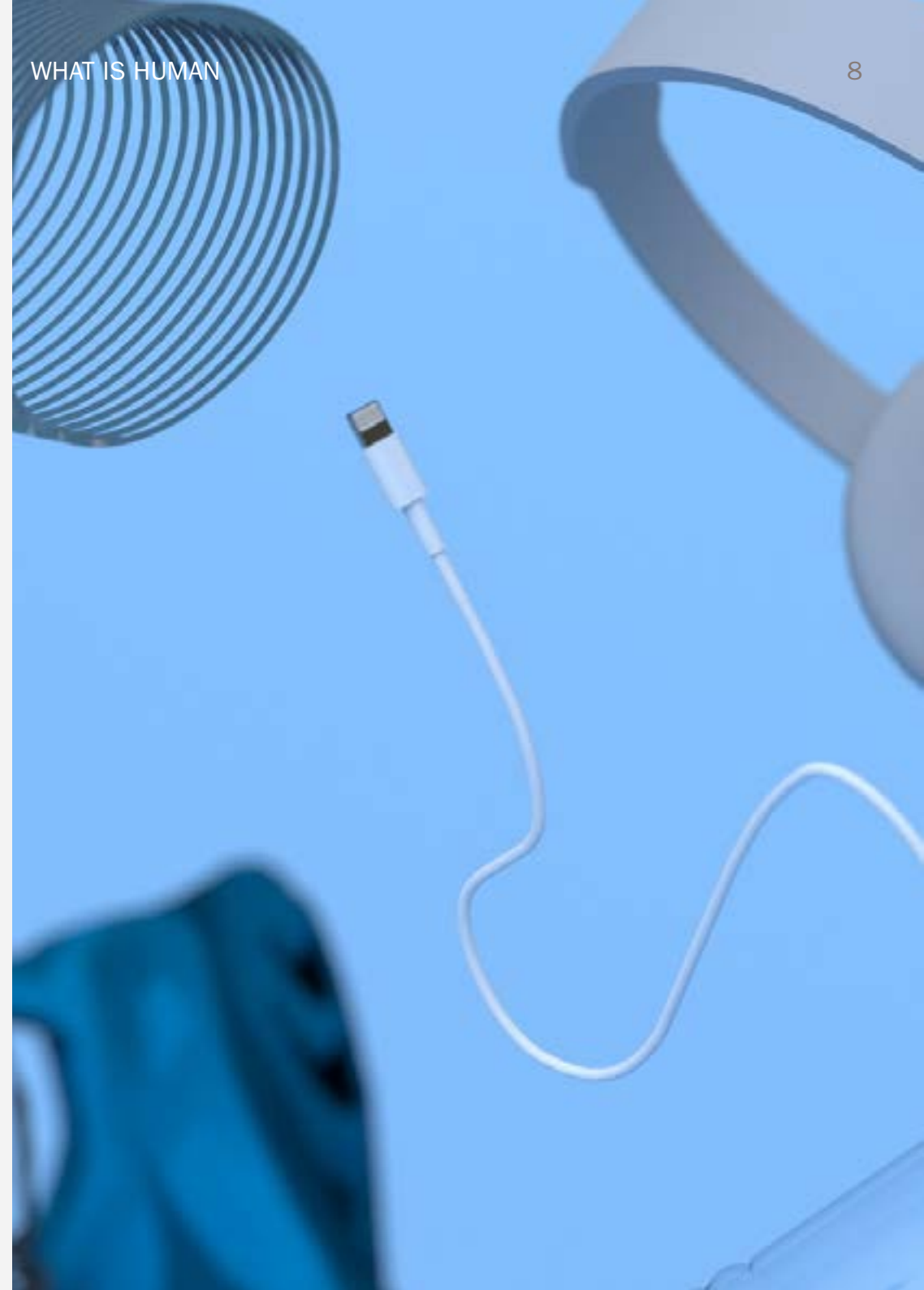
*NABS and Mind, 2018

The Opportunity

Whilst the communication buzz around 'What is Human?' continues unabated, the design of assistive products that enable all people to reach their potential lags behind. Last year we heralded the development of the braille digital watch but despite growing demand and tentative signs of this happening, the tidal wave of new assistive products has yet to come. Maybe that will change in 2019.

Take inspiration from the drive to be healthier, happier humans. Explore the actions you can take to provide health and wellbeing improvements for those around you, even if it means asking tough questions about your company culture. Is it truly a place where creativity can thrive? And what changes do you need to make to your workplace today to ensure you attract the best talent in the future?

But also think beyond your own walls. What can you learn from existing bold and brave creative ideas that tackle taboo subjects, challenge conventions and have the power to make a healthy change? Are there clients you can work with to move from short-term brand activations to campaigns that spark a long-term change? And what problems are you perfectly positioned to help solve – as an individual and as an organisation?



#1 Normalising the Normal





Bodyform bloodnormal

Agency AMVBBDO

Client Essity

Pencil Wood

For years periods have been treated as if they're something to be ashamed of. Adverts used blue liquid to distance their message from the reality of the situation. So Bodyform made a statement by simply showing blood, immediately provoking long-overdue debate around the issue.



End Embarrassment

Agency Interbrand Japan

Client Matsumotokiyoshi Holdings

Pencil Yellow

In Japan, when people buy toilet paper they conceal it out of embarrassment. This campaign challenges the awkwardness by taking a household essential and giving it attitude. Suddenly toilet paper was something worth being seen with.

Bullying Junior

Agency DAVID Miami

Client Burger King

Pencil Wood

One of the biggest problems with bullying is that people don't stand up to it. Burger King's live social experiment demonstrated that more people would stand up for a bullied sandwich than a bullied child. Within days the Bullying Jr. experiment was

shared over half a million times, earned over three billion impressions and over 100 million organic views. Today, Bullying Jr. is part of classroom curriculums worldwide.



Footnote for the breast

Agency The Classic

Partnership Advertising

Client Medicare Women

Pencil Wood

Almost 16% of all cancers in the UAE are breast cancer cases. Yet it's still a taboo resulting in late diagnoses. This campaign sought to raise awareness of breast checks amongst locals by placing pebbles with a message into the shoes of women

attending mosques. Without breaking any taboo, 18,628 women were reached with 33.3% then calling Medicare for a check-up.

Fractured Society



Giving everyone a voice is the foundation of fairness, equality and democracy, yet we've just seen the 12th consecutive year of decline in global freedom.

Since 2006, 113 countries have seen a reduction in freedom while only 62 have seen an improvement.

Freedom in the World, 2018

Even America has seen a decline in political rights and civil liberties*. And, like other western countries around the world, it has developed a paranoia about refugees. The fear of 'the other' has created a spirit of isolationism that is resulting in the rise of right wing extremism.

You can try to address the issues head-on with high impact, powerful campaigns that call for change or, better yet, you can start the change. We spotlighted this in the 'Opinionated Brands' section of our previous report where we showed how brave brands like Diesel, AMZ and Danish broadcaster, TV2, are speaking out against the inequalities they see. Beyond speaking out, we're continuing to see brands creating practical, problem-solving campaigns that directly impact an issue. One D&AD favourite, and winner of a White Pencil, is Trash Isles. This initiative from LADBible and the Plastic

Oceans Foundation drew the attention of global leaders to an area of plastic trash the size of France.

Time and again we're seeing great solutions to world problems created by brands or groups of concerned citizens. But despite all this positive action, we're still bombarded with a relentlessly negative news cycle of bickering and fear-mongering.

*United Nations Foundation, 2018

64% of consumers choose, switch, avoid or boycott a brand based on its stand on societal issues.

Edelman, 2018

86% of consumers believe that companies should take a stand for social issues. And 64% of those who said it's 'extremely important' for a company to take a stand on a social issue said they were 'very likely' to purchase a product based on that commitment.

Shelton Group, 2018

Why Care?

The never-ending stream of political bile and social injustice is contributing to the background stress in people's lives. In 2019, there will be an increased drive to escape the negative noise.

Netflix's subscribers have increased five-fold since 2011. Casual games continue to rise in popularity, with China predicted to have 1 billion gamers by 2022*. It's clear that many are simply taking time out to escape into a happier world of media.

As experiences become more important than goods – with 74% of Americans prioritising experiences over products** – the possibilities for escapism are expanding. Esports has extended its reach offline, with sellout live stadium tournaments. It's become so popular that Riot Games opened a dedicated League of Legends arena in South Korea. At Pharos Music Festival in New Zealand, Childish Gambino provided visitors with immersive

installations including 'truth connection booths' that helped festival-goers relax and reconnect with each other. Escapism can now even be prescribed. Scottish GPs working for NHS Shetland are issuing prescriptions of walks in the fresh air to reduce anxiety and increase happiness.

*Niko Partners, 2018

**Expedia & The Center for Generational Kinetics, 2018

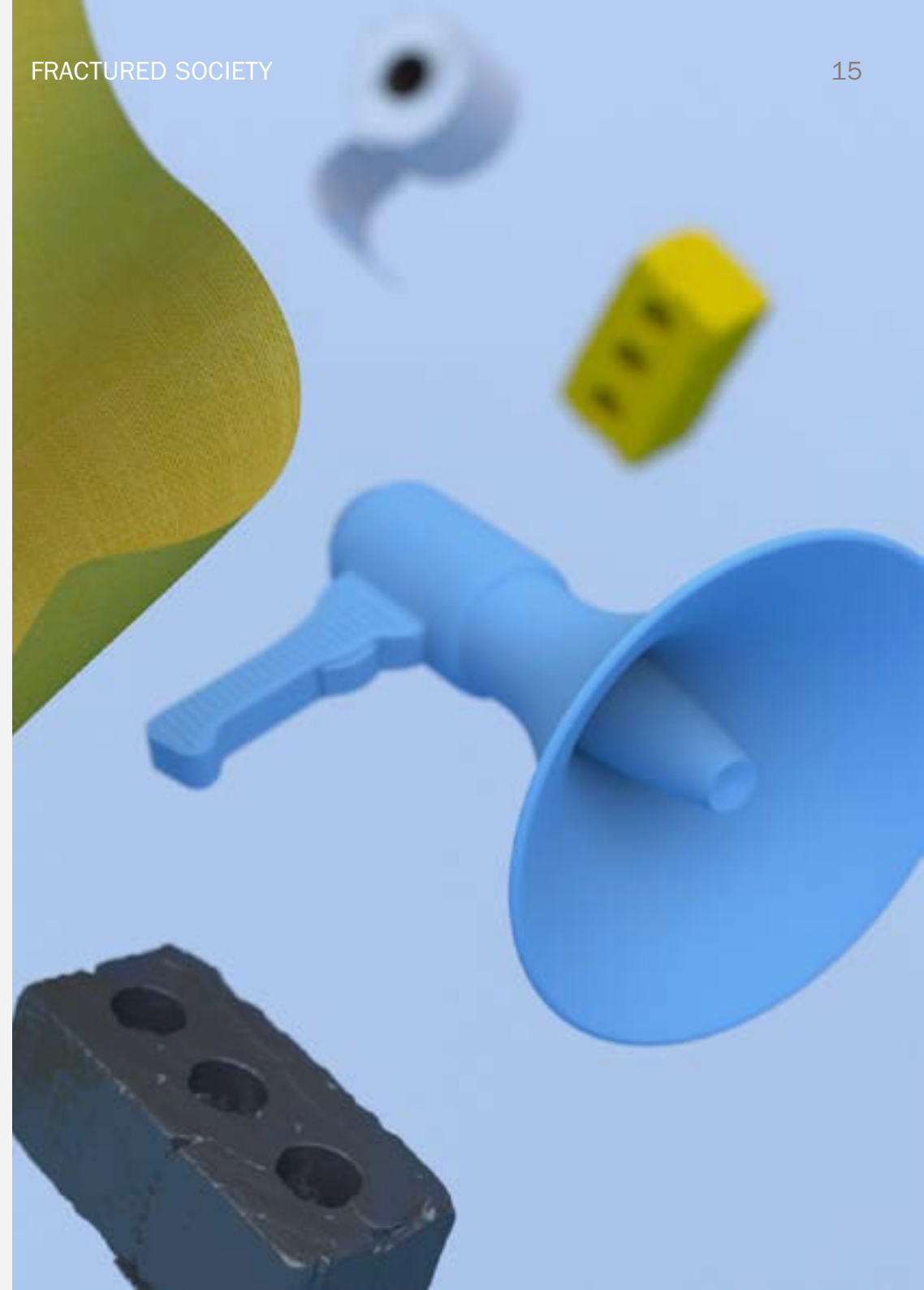
The Opportunity

The opportunity for this trend starts with a decision: are you in or are you out? Not every brand is in a position to project their point of view. If it's not appropriate or authentic to pick a side, don't do it. But that doesn't mean you can't still get involved. A whole host of brands – from Google and Spotify, to Getty and the New York Times – have found creative ways of remaining impartial.

For those in the position to find a solution, the only way to succeed is to go all in. Either provide a practical solution – as we saw with Trash Isles, The Colour of Corruption, Trump's Next Move and many more – or offer some escapism and relieve the monotony of hateful dialogue with humour. You can put a smile on people's faces without dumbing down or avoiding the important issues.

The advertising and design industries, with their understanding of media, content and wit, are perfectly placed to provide an escape from everyday stresses. However, in recent years we've seen an increased seriousness in marketing communications. That makes humour an even better opportunity to stand out. Just make sure you understand your audience and don't make the chuckles more important than the message.

Whether enabling action around an important cause or giving people some respite from stress, there's plenty of room for brands to get involved.



#2 Hero humour





Go With The Fake

Agency Diesel

Client Diesel

Pencil Graphite

Diesel secretly opened a real knock-off store called Deisel on NYC's Canal Street. The location was far from Fifth Avenue or other fashion hotspots, and right in the heart of the city's most notorious fake-fashion destination.



FKC: FCK

Agency Mother London

Client KFC

Pencil Yellow

In February 2018, delivery problems caused hundreds of KFC restaurants in the UK to close. It was a huge national news story, and KFC's response, published in the Metro and The Sun newspapers, succeeded in turning some bad PR to their benefit.



Friendshit

Agency GREYnJ United

Client KASIKORNBANK

Pencil Graphite

Friendshit is a hilarious story about a girl who tries her best to make friends at her new school, with help from her bestie. When all else fails, she resorts to the the mobile banking app K PLUS to save the day. The film reached one million views in three hours, while downloads of the app rocketed by 28% within a day.



Togetherness bottle

Agency The Corner

Client Coca Cola

The Oasis 'togetherness bottle' is a double-ended bottle designed to be drunk by two people at the same time. The parody campaign - shot in a popular style of filming real world reactions of everyday people - shows strangers trying to drink from the same bottle to promote social harmony.

Access All Areas



Technology truly is wonderful. It's making our lives easier in so many ways and continually opening up new creative opportunities. It constantly unlocks new forms of artistic expression for creatives that were previously restricted to the few.

This is an era of creative liberation. But when it comes to the platforms we rely on for news, connecting with others, or promoting what we do or who we work for, the power is still in the hands of their makers. From key players like Google and Facebook, to new tech created by Apple, Amazon and IBM, these companies have written the rule book and still have control of the creative output. Today, creativity too frequently lives within the constraints of these platforms.

But one emerging exception to this is the field of artificial intelligence. It's rapidly evolving to become an important tool in the era of big data - something we focused on in the last report. Machine learning is helping us distil and digest vast data sets to provide answers, offer security and give insights into our everyday behaviours.

For example, in the UK city of Rochdale, the local authorities are using AI to produce a 'feelgood index'. They're using local social media posts to gauge the happiness of their residents and get an understanding of public service improvements.

Brands are getting involved too. The Chinese ride-sharing service, Didi, launched its Smart Transportation Brain which combines the brand's data with that of governments and other partners to provide solutions to traffic problems.

The Financial Times is using the technology to improve the way it works. The paper has created a number of 'bots' that are helping tackle diversity in reporting. One example, the 'She said He said' bot, reveals the diversity of sources within stories in an effort to encourage journalists to be more balanced.

Alongside the Financial Times, Google is using AI to make us politer. If you say 'please' and 'thank you' to your Google Assistant it will be nicer in return. And even Finnish chocolate brand Karl Fazer created Lovebot Blues, a campaign that used AI to identify and interrupt hate speech on social media.

But where technology may give us some 'wow', it can also supply some 'ugh'. In recent tests, Microsoft, IBM, and Chinese start-up Megvii's AI facial recognition software all worked better on male faces than female faces, and on lighter faces than darker faces. When asked to analyse darker female faces, Microsoft's service had an error rate of 21%. IBM and Megvii's Face++ both had 35% error rates. And, years after first being reported, Google's autocomplete still pulls up awful suggestions in relation to race, religion and gender.

12.2 million people in the UK will block ads on a desktop computer, laptop or smartphone, the equivalent of 22% of the internet-using population That's up from 20.8% last year and is expected to rise to 22.9% in 2019.

eMarketer, 2018

76% of consumers who have been exposed to digital ads do not recall seeing them.

On Device Research, 2018

91% of people say ads are more intrusive today than 2-3 years ago

87% say there are more ads in general than 2-3 years ago

79% feel like they're being tracked by retargeted ads

83% of people agree with the statement "Not all ads are bad, but I want to filter out the really obnoxious ones."

Hubspot, 2016

Why Care?

Even with the help of AI, machine learning and automated ad targeting, these tech advances can only help so much. At best, people want to filter out the bad ads and at worst they want to block advertising altogether.

But AI is offering a new kind of creative assistance. Earlier this year, Adobe announced the incorporation of its Sensei deep learning algorithms into its Creative Suite products. Initially this will take a lot of the hard work out of tasks such as removing backgrounds in Photoshop. But it's also set to do more difficult tasks, such as removing objects from video. In this way, AI is becoming a creative assistant that will help us be more productive.

While these initiatives show the power of AI, it can't do the conceptual thinking for us and it doesn't understand how to craft an idea. Instead this is about working with technology to help do it better. Because it's not about us or them; it's about us and them.

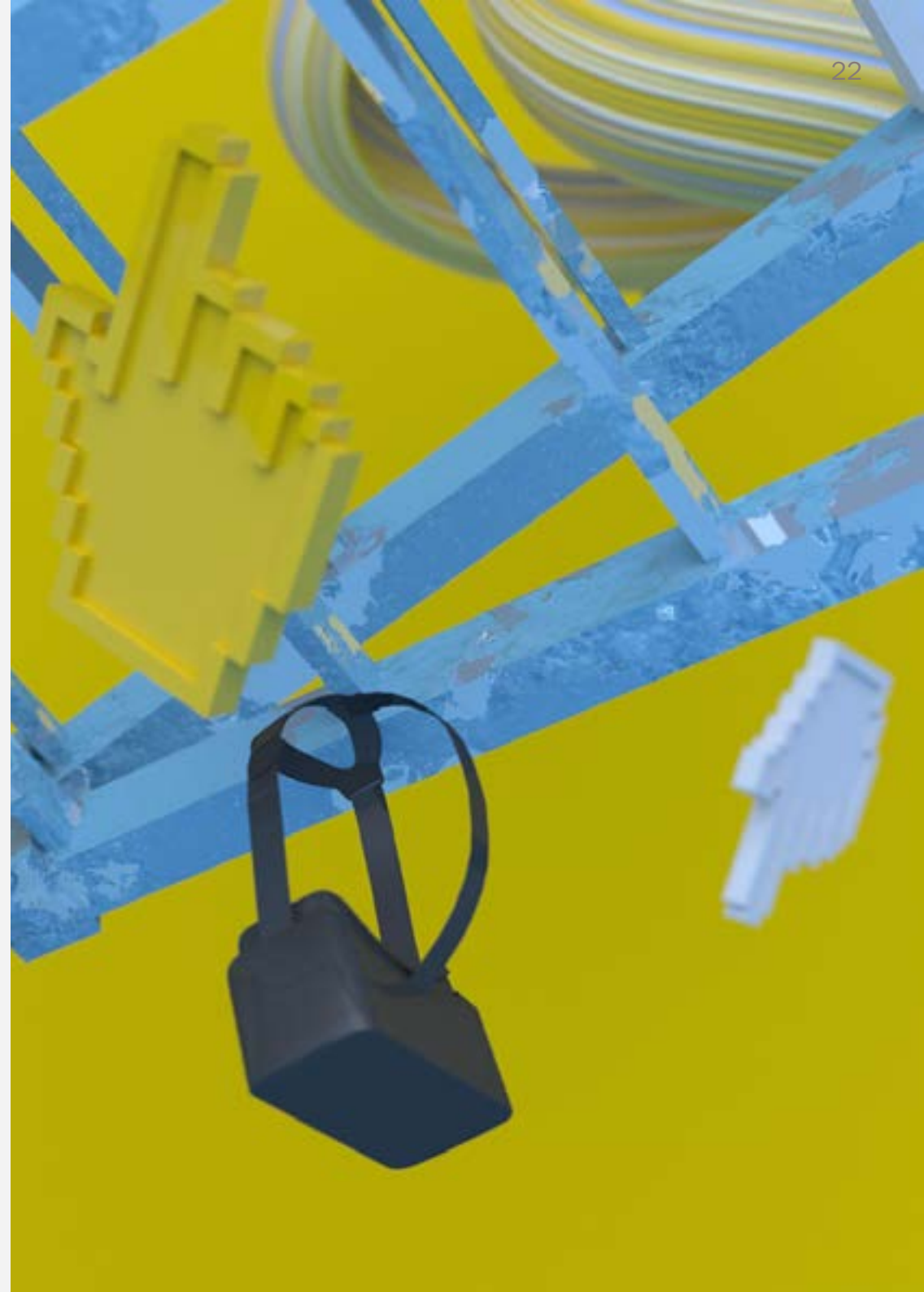
The Opportunity

In a world where people have a seemingly infinite amount of content at their fingertips, it's becoming harder to stand out. And, while technology opens up new opportunities to create personal, tailored content and reach people, it requires creativity to really cut through the noise.

The opportunity lies in combining powerful ideas and craftsmanship with new technology. Because it's not just about getting in front of more eyeballs; it's about creating engaging and persuasive work that's relevant to the audience.

Platforms rise and fall. Even Amazon and Google aren't exempt with initiatives such as Project Alias handing power back to the people. As ever, creatives have a responsibility to play, hack and manipulate platforms to engage audiences and get the results they're after.

By viewing tech as a platform or tool to create ideas, rather than the idea itself, the design and advertising industry can stop relying on technology to teach us the rules. That approach simply limits thinking and removes opportunities.



#3 Bring back the hack





JFK Unsilenced

Agency Rothco

Client The Times

Pencil Graphite

On 22nd November 1963, JFK was due to deliver a speech at the Dallas Trade Mart. His assassination meant that he never delivered it. At least, not until The Times used technology to bring it to life with JFK's actual voice. Using AI technology that analysed hundreds of recordings, they created an utterly convincing rendition of the best speech never heard.



NSynth Super

Agency Google Creative Labs

Client Google

Pencil Yellow

Magenta is a research group within Google, exploring how machine learning can help musicians in new ways. NSynth is one such algorithm that uses a deep neural network to learn the characteristics of sounds, then creates thousands of new sounds for music. To make it more accessible, sounds that NSynth generates were used to create a musical instrument that enables musicians to play it in a more intuitive way.



Live Looper

Agency BBDO New York

Client Downtown Records

Pencil Yellow

This Facebook Live music video takes advantage of the social media platform's time delay to produce an audio and visual loop pedal. For The Academics' live performance, an infinite loop-effect was created by filming the actual live-stream. The music video reached Reddit's front-page and went viral overnight.



VR Vaccine

Agency Ogilvy Brasil

Client Hermes Pardini

Pencil Graphite

Every year, children have to face that scariest rite of passage: a vaccine injection. Hermes Pardini, one of the biggest vaccine centres in Brazil, used VR to transport kids into a superhero experience, so the moment of application happened at the same time a super-shield was added to the kid's arm.

As this report shows, change and disruption are inevitable. As human needs evolve, social and political changes bring about uncertainty and technology forces us to question our role as creatives, some will approach it all with fear. Fear of the unknown. Fear of change.

What brings us, here at D&AD, comfort is confidence in creativity. We see the best creatives combine problem solving, inventiveness and imagination, and use their craft to create solutions which truly enhance people's lives.

With this report we've shown you a glimpse of the opportunities change can uncover. But that's the easy bit. Now, it's up to you. With the problems, challenges, briefs and brands you put your creative mind to, use this report as inspiration to find solutions to the problems facing your industry, communities or countries, or even the world.



3 big opportunities

Normalising the Normal

Take inspiration from bold and brave creative ideas that tackle taboo subjects and challenge conventions, and look for ways your creativity can inspire a healthy change.

Hero Humour

Whether enabling action around an important cause or giving people some respite from stress, provide an escape from everyday negativity with well placed – or well timed – humour.

Bring back the hack

Stop relying on technology to teach us the rules and start viewing tech as a platform or tool to create ideas, rather than the idea itself.

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