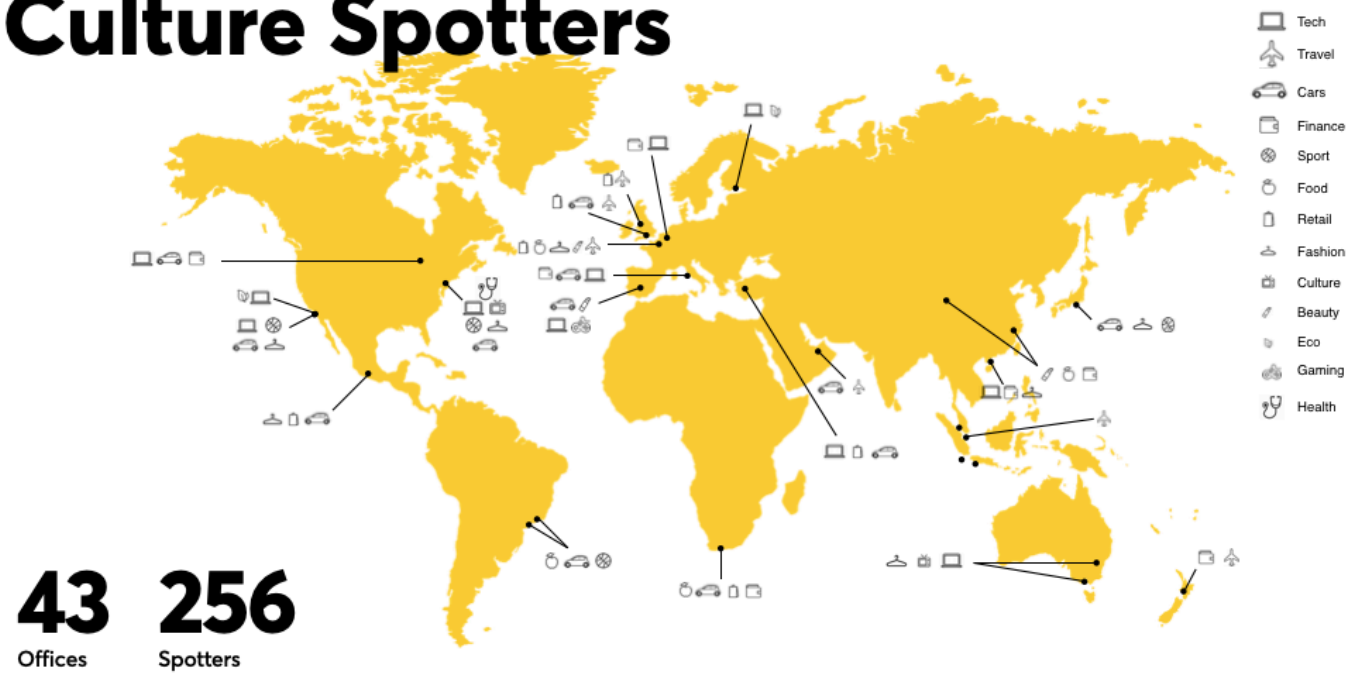


backslash

2018

Pre-Trends

Culture Spotters



About Us

Hey, we are Backslash — a cultural insight studio based in LA that's powered by a global network of 250 Culture Spotters, and part of the TBWA collective. A dynamic hybrid of strategy, analytics and content, Backslash aims to translate what's happening in culture for brands and pop culture thinkers.

We produce daily films that bring cultural inspiration to our network and clients; you can [watch some of them here](#). You can also follow us on Instagram at [@tbwabackslash](#).

An “Edge” is a far-reaching cultural shift that evolves over time. Mapping these Edges helps us codify and monitor cultural change.



Example Edge: Wacko World

The absurd, inexplicable and just plain weird have become commonplace as the depravity of an online attention economy seeps into real life—and marketing. This boundary blurring reflects broader anxieties around our increasingly unpredictable, illogical world.

Our Methodology

Working with our top global Spotters, we have identified our Top 5 predictions or “Pre-Trends” we see impacting culture in 2018. Part vision, part research, part expert interviews, all of our Pre-Trends are rooted in evolving cultural shifts we monitor over time — what we call our “Edges.” Backslash currently uses over 50 Edges to examine cultural changes in detail.

BACKSLASH GLOBAL EDGES MAP



In a world where division is increasingly the status quo, we're seeing another force roiling under the surface:

The convergence of unexpected worlds.

The Pre-Trends we've identified only serve as indicators of this larger shift. In 2018, genetic technology will collide with activism, memes with currency, digital goods with fashion, creative direction with algorithms, and cults will meet with social media.

Our polarized climate may welcome unity in any form.



Genetic Activism

Genetics will become the next frontier for activists.

Glossary

Health Span

DNA Donation

Previvor

Homebrew CRISPR

Genism

APOE4.info

Meet the “Genetic Activists” — those who rally for treatment, recognition, and legislation based on their genetic profiles. As DNA technology empowers people to predict and manage their health care, they will rise up to demand solutions and pharmaceutical investment for the conditions they may not yet have.

What's happening?

In 2013, Angelina Jolie pioneered genetic activism by getting tested for the BRCA2 breast cancer gene and going public with her status. She encouraged women with a history of familial breast cancer to get tested, take action and destigmatize the genetic status. Known as the "Angelina Effect," research shows there was an 80-fold rise in women seeking BRCA genetic testing driven by the Hollywood influencer.

But at the time of the "Angelina Effect," consumers were forced to demand tests from their doctors. Today, the doctor is no longer the middle man, and patients are in more control than ever. Cheap genetic testing kits are increasingly abundant and anyone can both decode their DNA and gain insight into potential hazards that may affect themselves or their families. Earlier this year, 23andMe was green-lit to reveal customers' risk of developing 10 diseases including Alzheimer's and Parkinson's.

Access to this data has now revealed a mass of "previvors" — those who have yet to be affected by a disease, but know that it's in the cards. Today, communities are arising around gene status such as BRCA or APOE4. Rather than wait for a diagnosis, these previvors will use their collective power to find solutions and fight for their voice to be heard by the government and big pharma.

"Wellness is a big cultural conversation and I'm noticing that people aren't afraid to talk about their illnesses publicly anymore. Genetic tests are binding people together, with the potential to create new tribes." says Paul Pfeleiderer, Chief Strategy Officer at TBWA WorldHealth and one of our Culture Spotters.

"You might see shifts in communities away from 'Patients like Me,' for those diagnosed, to something like 'We're the band of APOE4 people; this is who we are.'"

This will galvanize communities to demand industry research on their behalf. They will rally for affordable healthcare, which is such a contentious industry issue at this time," Pfeleiderer says.

Why is Genetic Activism emerging?

Healthcare has shifted from doctor-led to patient-led.

People are taking health into their own hands through apps, alternative medicine and self-diagnosis tools. As a result, health care is becoming hyper-personalized. The Swiss football club, FC Luzern, uses DNA tests to personalize training for its players.

We're living in an age of Activism. When Trump threatened to de-fund Planned Parenthood, it sparked a new breed of activism. "I think women are finding their voice and demanding equity in this world in a way that we haven't until now," pro-choice activist and Planned Parenthood President Cecile Richards says.

Application of CRISPR. CRISPR—the "Microsoft Word" of gene editing which "pastes" new genes into the place of faulty ones—was a biotech buzzword of 2016. Unfortunately, its inapplicability made it difficult for the public to rally behind. Today, its main proponents are either institutions, or [homebrew](#) activists. As the public sees gene editing as the cure for their future ails, CRISPR will become the hottest topic in human (mediated) evolution.

What are the implications of Genetic Activism?

Brands must ask themselves – "How far will we go with genetic technology, if at all?"

Data Donation. Charity won't just be about donating money, blood or plasma. DNA donation on an individual level will help researchers look at vast data pools to make connections between different genetic profiles at scale. Platforms like 23andMe are selling user data to research companies in an attempt to help them prioritize solving for certain disorders.

One platform to rule it all. Brands that connect data profiles together will spark new markets and economic opportunity. "A single tech giant may emerge as the one to connect all of our data together, and should already have hands in both the biometric and software space," says Pfleiderer.

Brands become allies. Consumers will not only expect hyper-personalized products and services based on their DNA profiles, they will expect brands to rally on their behalf.

Super Senior Activists. Boomers are in the firing line for many genetic diseases as they age. We predict they will take increased control of their health, data and visibility needed to affect change. They were a generation of hippie activists in the 60s, and genetic activism may be their second wave.

We are living in an age of activism—where politics and healthcare go hand in hand. Genetic activism is a new rallying cause.



Glossary

Social Scale Reality

Grammable

Snapchat x Jeff Koons

Vetements

Digital Fine Art Object

Meme Couture

"We live in a fantasy world and we need fantasy products to fill it," says modern soothsayer Rolf Jensen. As the physical and online worlds blur, we predict the rise of computer-generated goods like lenses, filters and virtual designs created purely to be worn on social media.

We call it "Vaporwear."

What's happening?

Yes, ephemeral accessories are already a thing. Take Snapchat's dog-face, rainbow vomit and nerd glasses filters which are cultural staples. The Kim Kardashian: Hollywood app has made \$100M from players accessorizing with clothes and makeup. But with virtual goods expected to top \$70B by 2020, (Statista), it's a behavior waiting to be merched by the Topshops of the world.

One way into Vaporwear is to make a meme out of your goods. Vetements' iconic DHL T-shirt became a viral sensation and digital product in itself, providing an access point for the millions who couldn't afford the shirt's 245 euro price tag. By creating a physical product that could spread on social, Vetements armed the masses with an "asset" that connected them to the brand with each post, share or RT.

Filters and photo ops will be another way into designer brand fandom. Take Gucci's ['#ThatFeelingWhenGucci'](#) campaign in which the brand commissioned @beigecardigan and @youvegotnomale to create memes featuring its new line of wristwatches. The resulting online art gallery was similar to Burberry's Art of the Trench, in that the product became the experience.

"The important thing is the convergence between the real and virtual worlds. We'll see more blurring between the two," says [tech futurist Ian Pearson](#). "Made for Instagram" real-world

experiences have been a sell-out sensation this year: Refinery29's 29Rooms and the Museum of Ice Cream are just a few examples of this.

Retail concepts like [Smashbox Cosmetics](#) and [Riley Rose](#) also use an Instagram-first strategy when it comes to interior design. "We wanted the store as well as all the products in it to feel very Instagrammable," [Linda Sook Chan](#) of Riley Rose has said. "There's a giant selfie wall with seats so that people can sit there and take photos of themselves. Hopefully people will be Instagramming a lot."

Why is Vaporwear emerging?

Fashion and social media are both about personal expression.

The emergence of fashion products to enhance our social presence is the logical next step for brands looking to connect with a generation that already invests [9 hours a day](#) in social media.

Buy with your eye. Likewise, young people want to buy into a brand without having to buy anything, which can be through a lens or experience. It's the access vs consumption model. One of our NYC Culture Spotters has identified a trend involving taking selfies in designer fitting rooms to show off wares online without actually purchasing.

What are the implications of Vaporwear?

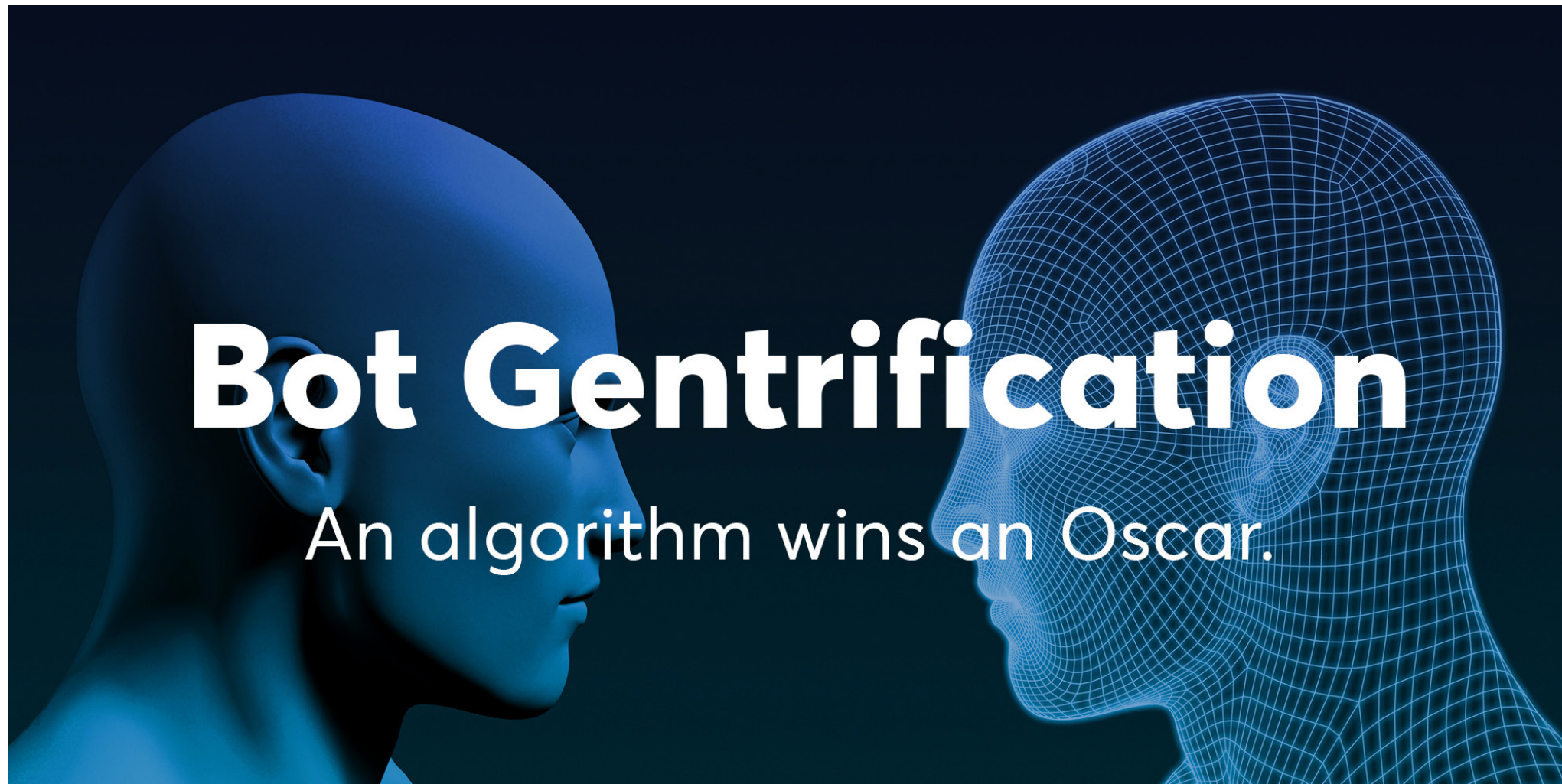
Brands must ask themselves — “How can audiences buy-in without buying anything?”

Social-scale reality. As brick and mortar retail is increasingly superseded by the almighty Amazon, physical retail must provide a new role in the lives of their audience. Today, the desire for social currency and transcendent experiences means that creating spaces purely to be photographed in will be key.

A new social economy. We envisage brands creating digital products only for use on social media. A made-for-Instagram range of Pat McGrath eye makeup is surely around the corner for Sephora. Likewise, we can envisage a 2018 \$8 Burberry trench accessible via Snapchat filter. It's a new form of social democratization that we think can also be monetized.

Social-speed R&D. We also see an opportunity for brands to use Vaporwear as a means of beta-testing new products to gauge demand before production. “Social media is your best focus group,” says our digital Culture Spotter Rohit Thawani.

In the coming future, everyone will be able to buy into a luxury fashion brand. And the price of entry will start from zero.



Glossary

Minimum Viable Content

Made by Humans

Blockchain Journalism

AI Creative Director

ANGELINA

Fake Artist Accusation

No industry is safe from AI gentrification: bot-manufactured content is about to explode throughout the creative industries. This means algorithm-penned songs, games, novels and feature films. The result will be divisive. For some audiences, the technology will deliver exactly what they want, but for others content will reach new lows and they will seek out more premium — and rare — “human-made” content.

What's happening?

Last year, the Internet was captivated by [Sunspring](#), a short film entirely written by a bot using neural networks. And then there's [ANGELINA](#), an algorithm that designs and deploys gaming plotlines from scratch. More recently, Spotify has been accused of [using "fake artist" bots](#) to create ambient music tracks in an attempt to avoid paying artist licensing fees.

It may be that the music industry is actually most ripe for the mainstream introduction of AI-generated content. "Electronic dance music has been hugely popular in the past decade, and it's likely that we may see a rise in algorithmically assisted music for this genre," says Chelsea Tadros, who manages social media for a major label. "While it's sad to think about a time in which human artistry could become obsolete, what this does is place greater importance on experience, curation and human-to-human interaction at live events — the main setting for EDM."

Why is Bot Gentrification emerging?

Humans have never been more traced, decoded and analyzed. With contextual data inputs via Face ID and voice search, algorithms can now cross-reference human reactions with creative content. This means that algorithms can better understand and design content that we may not even know we'll enjoy — before we even see it.

Branded bots are everywhere. According to Forrester, 32% of top brands surveyed say they are planning to use or test bots within the next year. Through conversation, bots are gaining a drip-feed of consumer data. Burberry and Tommy Hilfiger have both launched bots allowing the user to watch fashion shows and have conversations about the designer's inspiration.

Clickbait, under pressure. Brands, platforms and media outlets have never been under more [pressure to generate clicks](#), as impressions on a page mean more ad revenue. The need for speed has hit the content realm, so any advantage in "kicking out the jams" is considered vital.

What are the implications of Bot Gentrification?

Brands must ask themselves — "Who will make our content: human, machine, or both?"

End of creative risk. Led by streaming platforms, producing creative content will no longer be a gamble, as machines will offer insight. Netflix claims its AI recommendation system saves them around \$1B each year, which allows them to annually spend \$6B on new content. This will hold major value for the film industry, which today relies on franchises as a proxy for success.

“Made by humans” becomes the next “buy local.” Creative products made by people will become an ethical choice in the same realm as “fair trade” or “locally made.” There will be increased pressure on brands to reveal whether content was made by human or machine.

“Human-made will be something you can trade on,” asserts tech futurist Ian Pearson. “But it will not always be positive. Some people will prefer the AI because it gives them exactly what they want. Some people will want human expertise. Human-made will matter most in crafts, sport and certain areas of entertainment where we value the human factor. You’ll pay more for the human-made.”

Blockchain journalism. In the age of fake news, it may be that news written by verified algorithms will be more truthful, potentially employing blockchain technology to prove an unbroken link to an accurate source. [Civil](#), a news source employing blockchain was seeded \$5M in funding this past October.

Content quality will reach new lows, and volume will reach new highs. The creative industry will be gentrified by bots, with the creation of a content class system.



Meme Money

Blockchain becomes a new business model for meme artists.

Glossary

Pepe Cash

NASDAQ

Cryptocollectibles

Limited-Edition Ads

Ethereum

Rare Memes

Once dismissed as “vanity metrics,” shares, likes and follows have generated real economic value for influencers, publishers and brands. So, the cash must be flowing for all the memers out there, right? Nope. There’s an unsettling paradox that faces these creators: the more shared their work is, the less it becomes their product. We think blockchain could be the answer to creative attribution — and meme monetization.

What's happening?

The “memecraft paradox” was front and center last year as popular Instagram accounts [@TheFatJewish](#) and [@FuckJerry](#) came under fire for profiting off memes pilfered from Reddit. Yet in many cases, there was no telling who had originally created the viral content.

Creative attribution hasn't just been a problem in the meme world. In April 2017, it was revealed that 25% of Spotify's catalog was unsourced — resulting in [\\$25M in penalty payments](#) to the National Music Publishers Association. Spotify argued that it was impossible to determine ownership for every track in their 30M-strong catalogue. To solve this, they bought [Mediachain](#), a company that applies blockchain technology to music as a means of tracking its origin.

We believe blockchain may offer a way for meme artists to maintain a level of ownership over their content. Blockchain is a technology that provides a “transaction record” between people and ensures everything is legit, replacing the need for a bank or institution. Experts think that this verified list of transactions can connect other forms of media back to a source, proving authenticity. This means that meme creators could use blockchain to prove ownership and sell their work in an instant.

Pepe the Frog is one of the pioneering examples of applying blockchain to memes. The frog meme, which got co-opted by the Alt-Right due to the problem of ownership, demonstrates [how lucrative blockchain can be](#) and the creative integrity it offers meme artists. With a current market cap of \$75M, Pepe has spawned its own currency — Pepe Cash.

Artists can post Pepe-themed cards in the [Rare Pepe directory](#) and decide how many copies of their art will exist. For example, only 132 people can own a [Melancholia Pepe](#) card which is digitally signed by the artist and certified by the blockchain. It's the limited-edition Air Force 1 of memes. Creating scarcity and collectibles is a familiar business model in the retail world, and could be applied to the internet — a space that promotes mass over scarcity.

“Creativity, improvement and tokenization of digital art on blockchain has only just started.”

“The ability to create ‘digital scarcity’ where you can prove there's a limited number of digital art on a blockchain, will lead to opportunities for artists to monetize digital content and get rewarded in the future,” says Koji Higashi, a cryptocurrency expert based in Japan.

[Cryptokitties](#) is another example of digital collectibles powered by blockchain. People can buy the one-of-a-kind digital creatures and ensure that they cannot be replicated, altered, or destroyed. Using Ethereum's blockchain, Cryptokitties has seen [\\$2M+ in purchases](#).

Why is Meme Money emerging?

Meme artists have been left behind. Social influencers are visible in their own content, and have reaped the rewards. Digital artists haven't been able to assert ownership, so they've missed out.

Memes are mainstream. Memes are the pop culture of the day and they're having a huge influence on marketing, from the MailChimp ads to the McDonald's Szechuan Sauce craze, shaping this into a legit economy.

Blockchain gets practical. Blockchain has always been difficult to understand, but tangible applications of it, like Cryptokitties, are inspiring the creative community to tap into its potential.

What are the implications of Meme Money?

Brands must ask themselves — "Who's our meme collaborator and how can we use the idea of digital scarcity to create value?"

Collectible brand content. As brands are increasingly able to identify and collaborate with meme creators, there is opportunity to release branded, rare digital products and collectible ad art. Yes, we said it — precious, collectible ads.

Meme patent trolls. Creative attribution may also spark a rise in creators charging unsustainable premiums for licensing or policing their work and keeping it under lock and key.

Content valuation markets. Redditors already have built a system to determine the value of memes. Called NASDAQ, it seeks to use shares and other qualitative measures to rank them — a massive challenge. Most intriguingly, NASDAQ calls attention to the problem of appraising digital goods, and the need for better systems to track shareable content.

As creativity on the blockchain develops, this may lead to an explosion in meme creativity as it becomes a legitimized economic activity.



Glossary

Cult Fandom
Tribal Advertising
Jake Paulers
Poppy Seeds
Mass Niche
Flat Earthers

Cults aren't just a thing of the past. We believe that 2018 may see the formation of a new kind of cult — one built around a personality who manipulates social media, monopolizes attention and mobilizes fans. Sound familiar? Also, cult activity tends to spike during times of social uncertainty, when people turn to community for solace. Is the stage set for a social influencer to tip over to full-on cult leader?

What's happening?

Social influencers have more power than ever — commanding a market worth \$1B and set to double by 2019, according to [Mediakix](#). They are the role models of our age, with 75% of children saying they want to be a YouTuber or vlogger when they grow up, according to a recent [study](#).

Internet star Jake Paul may be following the cult leader playbook. His nation-sized fandom, the “Jake Paulers,” are over 10M strong, and [dedicated to their leader](#).

“The Jake Paulers are the strongest army out there,” Jake Paul told NPR when neighbors threatened to report him to authorities for disturbing the peace.

Disney parted ways with the star who fronted one of its shows after it was reported he had turned his neighborhood into a “war zone” shooting viral content. Then there’s Poppy, an ethereal, Bot-like YouTube star who has already inspired her own religion. Poppy is the subject of several conspiracy theories, including that she is a robot, a member of the Illuminati, or a pawn subjected to mind control. She is a figure of worship for her fanbase known as the “Poppy Seeds.”

One fan has even invented a religion in her honor called “Poppyism.” [In one of her videos](#), Poppy speaks to her status by asking followers to repeat, “I am not in a cult”, as masked figures hold spiritual icons. At a recent concert, Poppy passed out [cups of Kool-Aid](#) and announced “Poppy is not responsible for any fatalities.” Creepy? It hasn’t stopped Sanrio and Comedy Central from working with her.

Mainstream stars are also displaying signs of cult leadership. [Katy Perry stripped naked](#) and used her body as clickbait in order to drive votes for Hillary. [Lana Del Rey](#) asked her fans to curse Donald Trump using witchcraft. Even [Eminem got in on the action](#) by telling the world that he’d disown any fan of his who also is a Trumpster.

Part of the appeal of the cult-like influencer is the aura of mystery that surrounds them. In an age of “I’m-just-like-you,” instant-access celebrity, being unknowable and reclaiming the pedestal is refreshingly alluring.

While boasting massive followings, the typical YouTuber lacks a critical ingredient in the cult formation recipe: an ideology for followers to adopt. On the other hand, many niche communities that are ideologically charged are lacking charismatic leaders and centralized action.

With scholars pointing to Donald Trump as wielding both of these traits, we may see this trickle down to younger or more centralized influencer groups.

"Trump has harnessed the kind of emotional intensity from his base that is more typical of a religious revival meeting than a political rally, complete with ritualized communal chants ('Lock her up!)," Reza Aslan said in an Op-Ed for the LA Times.

Why are Insta-Cults emerging?

Rise of tribes. We are becoming more tribal as a society and more defined by our subculture than national identity. This is leading to an uptick in the number of ideologically driven niche communities such as [Flat Earthers](#), [Red Pill](#), and [Millennial Witches](#), in other words, modern cults.

Filter bubbles. Polarization, Post-truth and Filter Bubbles are a recipe for cult activity. We are living in our own little worlds.

Cult Renaissance. The death of Charles Manson, shows like American Horror Story: Cults, and the success of Donald Trump have reignited mass interest in cults.

What are the implications of Insta-Cults?

Brands must ask themselves — "What are the positives we can learn from influential personas their loyal fandoms to build relevance?"

Brands as cult proxies. As brands scramble to gain reach by connecting themselves to influencers, the next iteration could be brands becoming religious proxies or cults in their own right. By borrowing mechanics used by influencers, they can achieve this.

Take a position. Brands must be willing to address the rise in social media cults — by either supporting or condemning — there will be no ignoring it.

Segmentation is dead. Brands need to rethink old-fashioned segmentation and bland, homogenous messaging. Think smaller about your community and prepare to get radical about shared issues.

In this tribal era, winning brands will act like subcultures and consumerism will feel indistinguishable from hard-core fandom.



Thank You

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