

THE STATE BRAND

2025 OF



PRESENTED BY
RED ANTLER

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Even for an era defined by technological innovation, the pace of this past year felt dizzying.

(Mostly driven by one core theme that rhymes with “say hi” and may or may not upend the entire world as we know it, depending on whom you ask.)

And of course, every major advancement brings big questions about the future of culture, commerce, media, and how soon till the robots take over.



Pinpoint-accurate social media that connects like-minded people is now chided for not helping those same people get offline.

Generative AI is lauded as a useful tool for mundane tasks but bashed when creative work leverages nonhuman labor.

People can more or less eliminate every unnecessary, unrequested interaction from their lives, which of course leaves everyone pining to be surprised.



These times are a' confusing, and as brand builders, our charge is to figure out how businesses can respond to these contradictions.

Dive in for expert predictions, hot takes, findings from our recent study with Centiment,* and a healthy dollop of hope.

*WE PARTNERED WITH LEADING CONSUMER INSIGHTS PLATFORM CENTIMENT TO ANALYZE THE FACTORS THAT MOST INFLUENCE PURCHASE DECISIONS AND BRAND AFFINITY TODAY.

SAY LESS TO
DO MORE

01



The ability to talk to people anywhere, anytime is a marketer's dream come true. But for many, being "in the room" comes with the pressure to be the loudest. Sometimes it feels like every brand has tried for a viral, satirical X war or commented on a TikTok of two raccoons cuddling ("me and my ex").

The fun of businesses behaving unbusinesslike is fading. Just because we can doesn't mean we should. It's all too easy to make noise without adding value, and consumers need space, now more than ever. It's time for brands—not just for the sanity of their social media managers, but for their success—to take a step back.

Just because we can



doesn't mean we should

01.01

You may not
have rizz, and
that's OK.





When every brand tries to sound authentic and human, none do. We're looking forward to a near future where brands go against the zeitgeist and focus on sounding true to themselves and their purpose.

Not only is there nothing wrong with being a brand that talks and acts like a grown-up, but these are also the brands we desperately need in 2025. Consider this a free pass to scrub your 2025 content calendar of any emoji-laden email subjects or social posts soaked in Gen Z slang.

EXAMPLE

Archer

Electric air taxis are on the horizon (for real) and Archer is leading the way. Other brands have tried to convince the masses to embrace flying cars by downplaying their innovation as mundane and everyday. But Archer has taken the opposite approach, embracing the epic nature of its endeavor with a brand that's sleek and serious. Archer foregrounds its expertise above all, thereby cementing it as the clear authority.



01.02

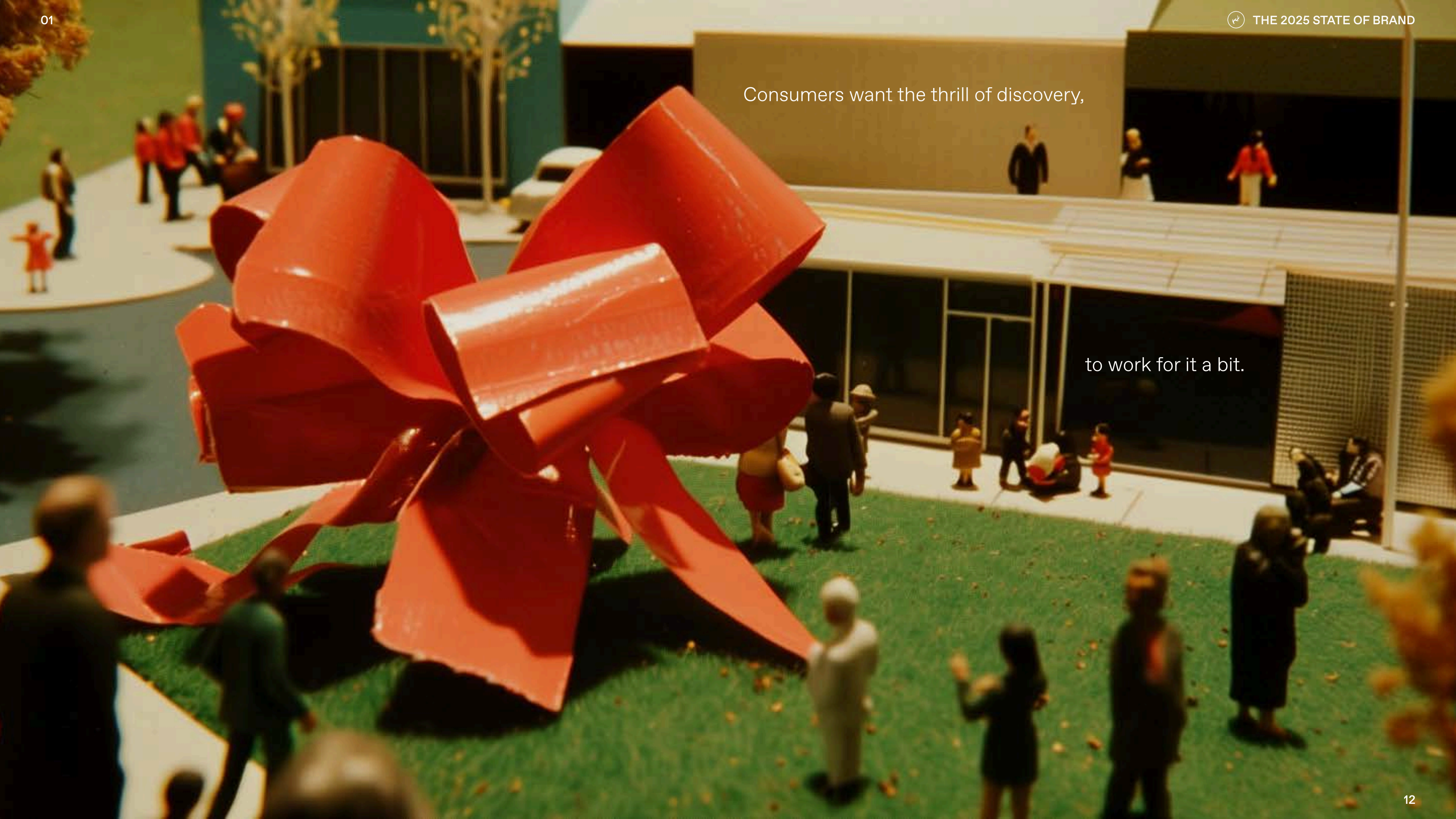
Hard to get is unforgettable.

Brands have long chased audiences, but that's about to change. Consumers want the thrill of discovery, to work for it a bit. When a brand is captivating and even a bit scarce, it makes for a more-powerful long-term relationship.



Consumers want the thrill of discovery,

to work for it a bit.



EXAMPLE

Pat McGrath

When fashion fans clamored to understand the process for recreating Pat McGrath's viral 2024 Maison Margiela glass-doll look, she gave them what they asked for. But the experience was incredibly IYKYK. McGrath announced on her own Instagram page that a how-to would be conducted, on Instagram Live, within the same week. Thousands tuned in for the tutorial, and it wasn't even recorded. Today, the records only exist in fan bootlegs scattered across YouTube. This may seem like a missed opportunity for mass accessibility, but McGrath understood that the mystique was the point.



01.03

Make it unofficial.





Consumers are hungry for information but more attuned to (and skeptical of) sponsored and ads disguised as real opinions. In our study,* 50% of consumers agreed that "companies often make false or misleading claims about their offerings." Brands that want to inform will need to deemphasize their presence. Share knowledge first; you can sell yourself later.

*INSIGHTS POWERED BY CENTIMENT



“
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make false or
misleading claims
about their offerings.”

CENTIMENT SURVEY

EXAMPLE

Sonos

Smart brands realized years ago that they couldn't fully control their narratives and needed to invite other voices in, from user reviews to influencers. Sonos used this evolution to its advantage with its unofficial Reddit ambassador, KeithFromSonos. Keith is one of many employees who happens to really love the brand. He talks up Sonos where appropriate, but sparingly. His mix of real talk, solving user errors, and most importantly, offering up proof of life outside of marketing assets, makes him one of the few brand voices that aren't summarily booted off the platform.

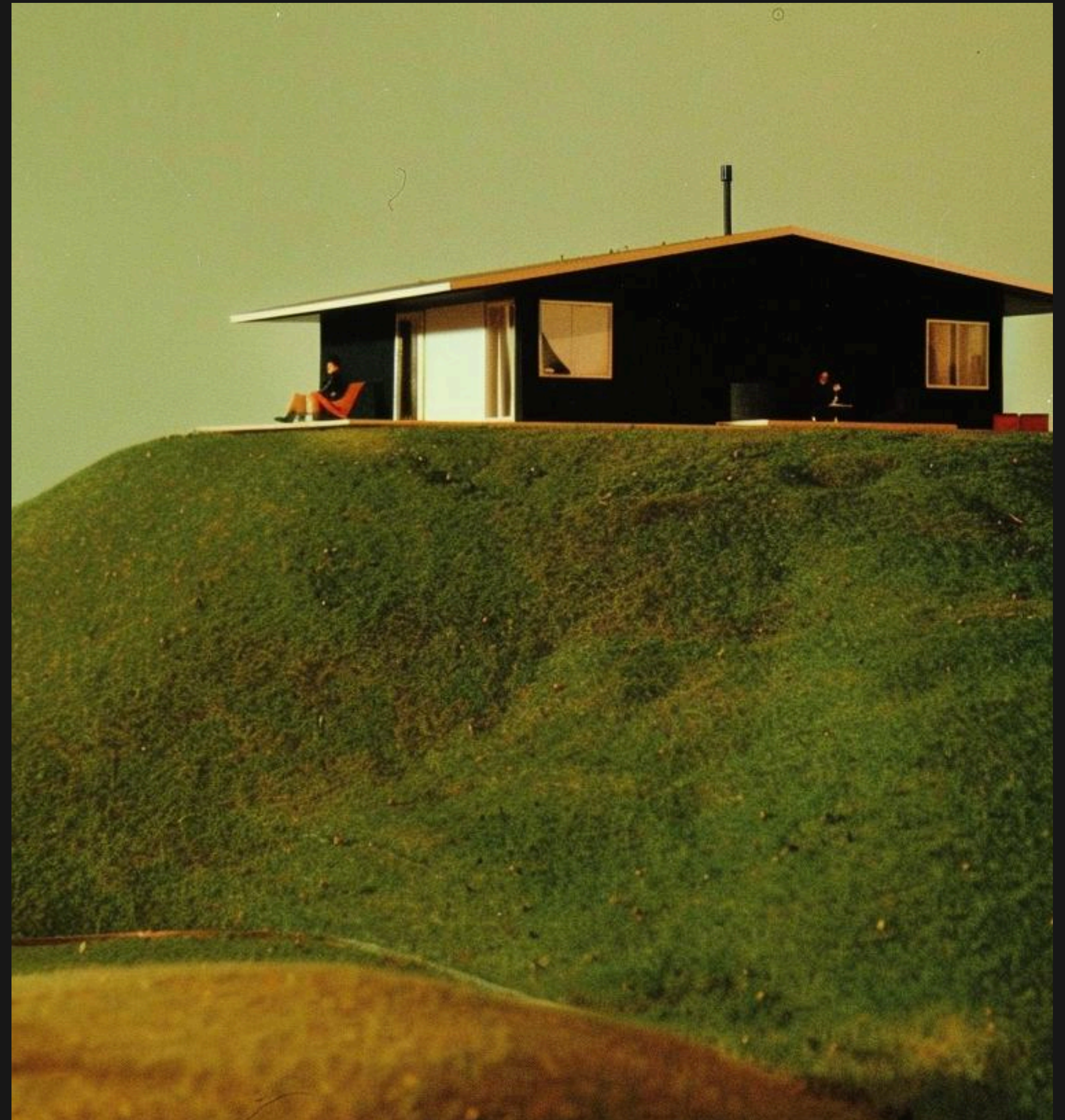


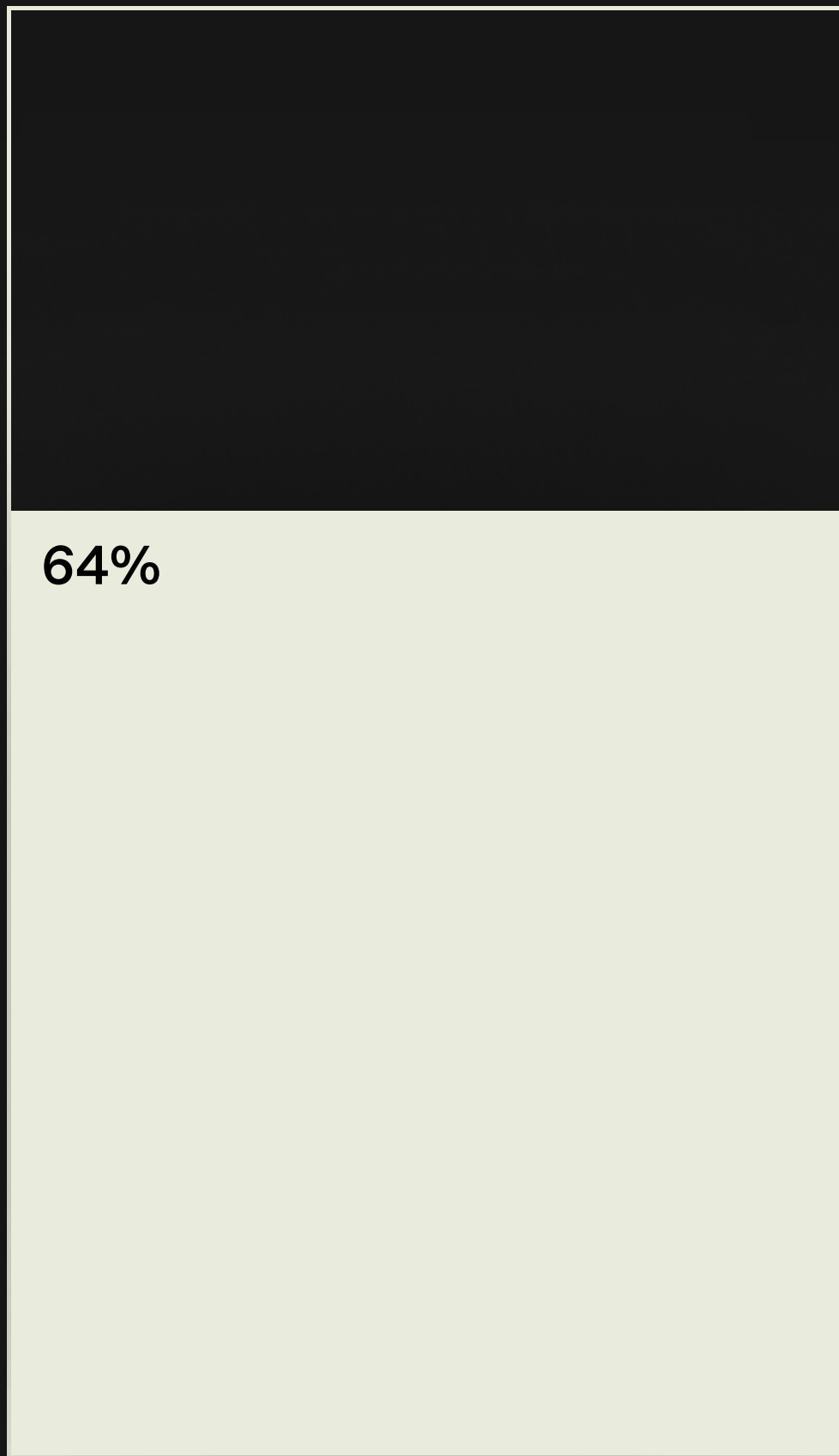
Keith 
u/KeithFromSonos

01.04

Small, offline, and doing just fine.

If it's trendy, proceed with caution. Our study* showed 64% of consumers associate premiumness with history/heritage over trendiness. And travel is a prime example. Ever since the post-pandemic travel frenzy, social-media-fueled wanderlust has taken people to the same places: the Hamptons, the Amalfi Coast, the temples of Thailand. But the most coveted destinations of tomorrow won't be broadcast to the masses on the FYP. Smaller, niche circles will flock to intriguingly low-key destinations. A social-media-free vacation is the new social-media-fueled one.





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EXAMPLE

Visit Oslo

In Europe, iconic cities like Paris and Rome are overrun with tourists, turning a cultural experience into a theme park. Visit Oslo realized this and rebranded as a place to escape tourism. In a deadpan tone, it waxes poetic about how there's nothing really worth seeing in Oslo. It's the polar opposite of the smartphone-filled Mona Lisa room at the Louvre or the crowded piazzas of Italy. And that's exactly what makes it so flight-worthy.



Q2

TECH-TO-THE-
BACK IS THE NEW
TECH-FORWARD

For years, businesses have been obsessed with creating frictionless experiences, a trend exacerbated by a global pandemic and ubiquitous tech adoption. Restaurants swapped menus out for QR codes. Hotel chains made the smartphone the new concierge desk. But is technology always the answer?

AI will allow for the digital doings of businesses to become more and more invisible—which ironically could be just the thing to allow humans once again to shine. Tech will continue to play an increasingly vital role, but as science-fiction author Arthur C. Clarke said, “Any sufficiently advanced technology is indistinguishable from magic.”

Think of Partiful, the popular event planning platform. It was named Best App of 2024 by Google, but it doesn't keep users trapped in the tech. You don't need to download the app or even create an account (all Partiful needs is a phone number), because the brand's ultimate goal is to create more face-to-face gatherings.

When we say tech-to-the-back, we're not talking about an analog revolution. This is about realizing that the ultimate frictionless interaction is one that feels wonderfully human.



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“

Any sufficiently
advanced technology
is indistinguishable
from magic.

SCIENCE-FICTION AUTHOR ARTHUR C. CLARKE

02.01

Reject curation.
Embrace
randomness.





People are realizing that hyper-personalization and perfect curation isn't a utopia. It's actually limiting and kind of ... boring. Using technology, brands need to incorporate the randomness of the human experience. Think: a music streaming app that feels more like a record store, where you organically (not algorithmically) discover new music. Or a fast food chain that feels more like a neighborhood joint with daily specials (and no substitutions).

EXAMPLE

Crumbl Cookies

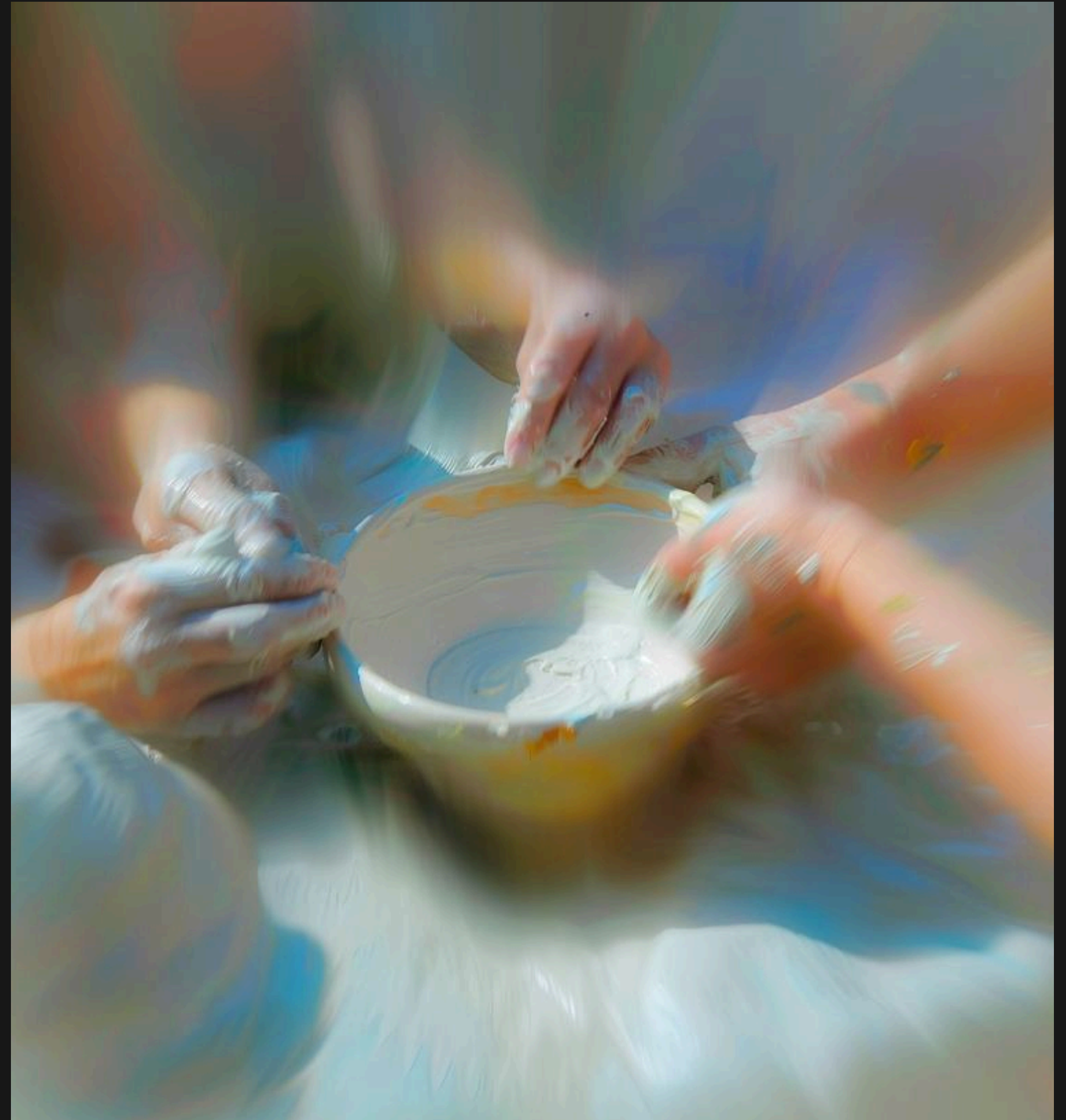
Crumbl is known for its deliciously caloric cookies and iconic pink box, but it's far from a traditional bakery. On the back end, the dessert giant is an AI and data behemoth. Its hugely popular app combs through mountains of UGC to identify quality issues, channeling that feedback directly to franchises. Each location sells a random selection of its almost 170 cookie varieties, keeping consumers on their toes for what sweet treats may show up next. Fans routinely take to TikTok to review each week's new cookies like it's a streetwear drop. The operation is highly digital but the experience feels surprisingly offline.



02.02

People make it premium.

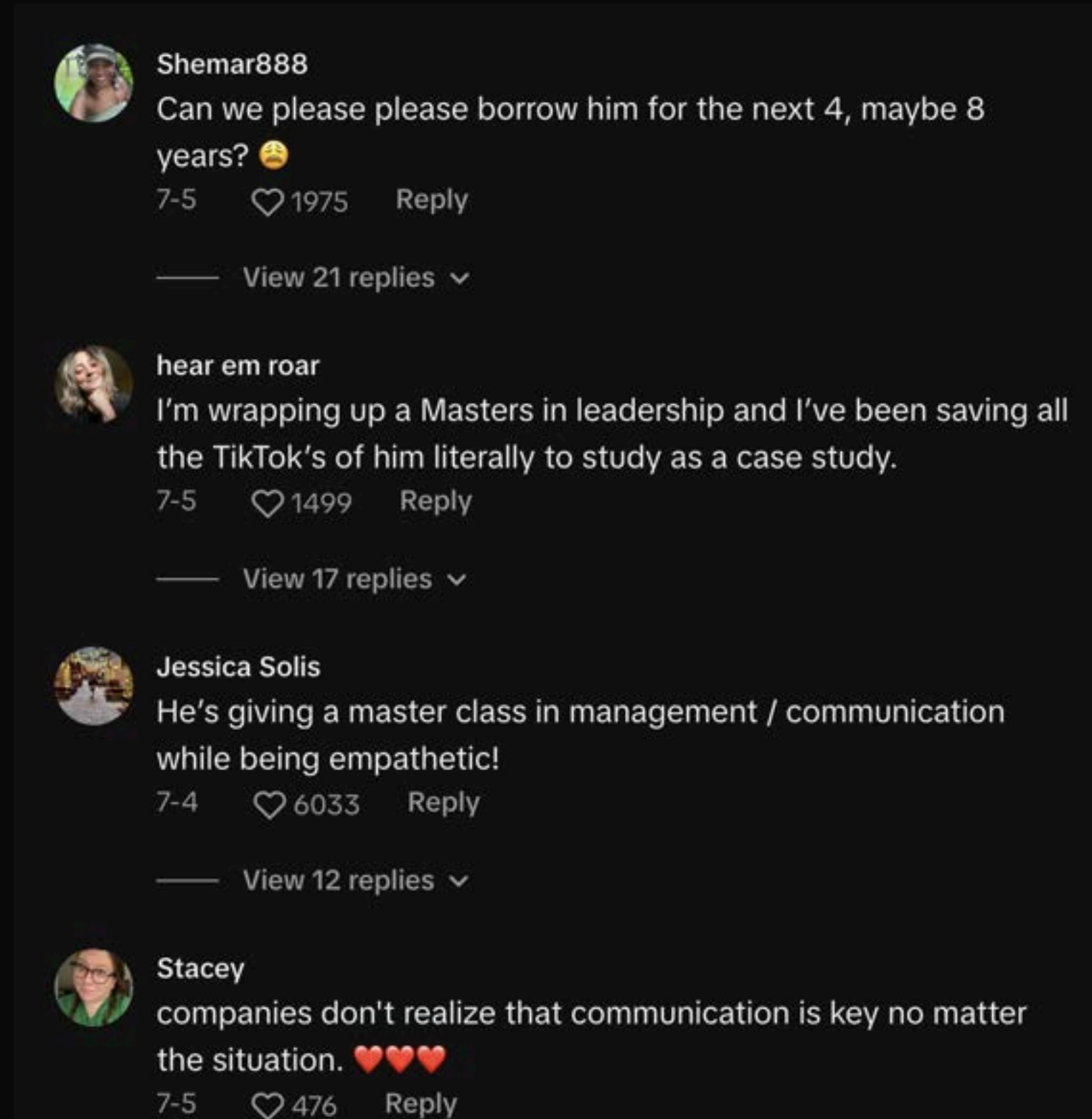
Human-created products and experiences will define what's aspirational in 2025 and beyond. Showcase what's made by hand. Give customers the option of having products sourced or selected by a fellow human. Empower your retail staff to improvise service and hospitality versus following a corporate playbook.



EXAMPLE

Sandals Resorts

When a hurricane barreling toward the Caribbean forced many Sandals resorts to shut down, Deryk Meany, manager of the Sandals Dunn's River Resort in Jamaica, became a TikTok darling for his warm hospitality and clear communication during the crisis. A far cry from boilerplate statements, his instinctual response to protect his guests shone through the impending storm. Fans on social media hyped Sandals as a result and even advocated for Deryk's promotion.



02.03

B2B with a heart on its sleeve.

There's no longer a thick line dividing when your audience is in B2B buyer mode and when they're simply another person. They use the same smartphone for Slack and TikTok (and neither are relegated to set hours). It's not a question of choosing whether to inform or delight. Brands will comb through their pragmatic B2B plays and ask how their moves will appeal to the person—not the business—who will be taking it all in.



EXAMPLE

Ori

Ori is GPU cloud infrastructure, essentially the deep B2B tech that's powering the AI era. But its brand breaks every B2B tech trope with a wonder-filled, otherworldly approach that illustrates the possibility its tech enables—lighting up the imagination of even the most technical buyer.



EXAMPLE

Typeform

Typeform's Now You Know campaign flips the script on B2B marketing by leaning into the same creative energy and visual appeal you'd expect from top consumer brands. With bold colors and oh-so-relatable scenarios, it treats business buyers as people first in a way that bolsters Typeform's appeal and credibility (rather than detracting from it).



03

BRAND AS THE
ADVOCATE FOR
OPTIMISM



Our political landscape is fraught with cynicism, anger, and extremism. Our financial future feels hazy at best. Parts of life we took for granted suddenly feel up for grabs.

In many ways, the new year feels less celebratory and more like a collective hunkering down.

Brands will have to do business amidst this very real feeling. And they can do it well with an ultra-long-term strategy—one that transcends the current moment and invites consumers toward a bold new idea of the future.

03.01

Durable is the ultimate status symbol.

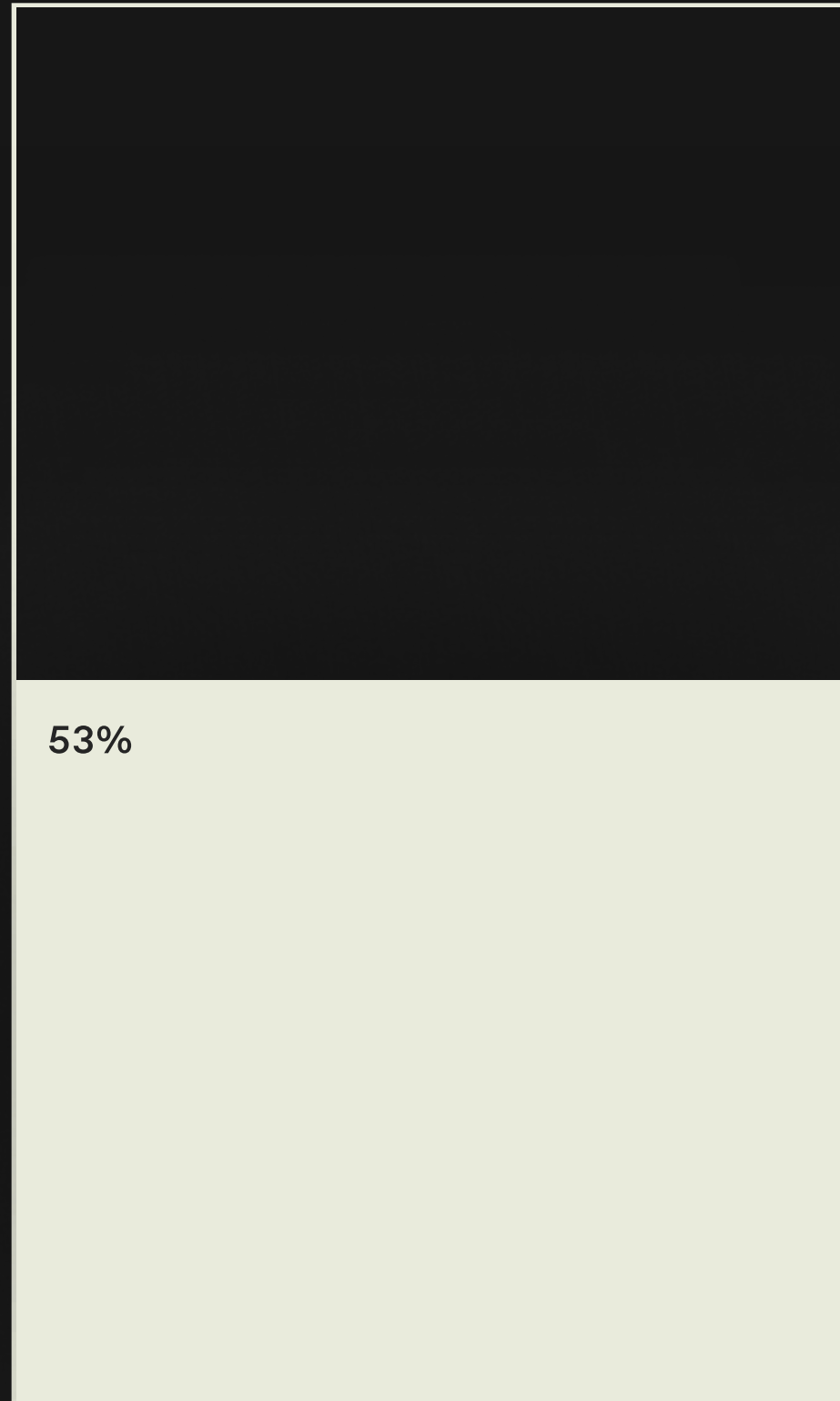
When times are tough, consumers look for products that can weather the storm. Gone are the days of superfluous sophistication—durability will become the most coveted luxury.



In our survey,

53%

of respondents said “reliability and durability” make a product premium



while only 38% said “a prestigious reputation.”

*INSIGHTS POWERED BY CENTIMENT

EXAMPLE

RTIC

While some outdoor gear has become a status symbol on Hamptons beaches, RTIC's brand is built around the idea of "real life stuff"—focusing on undeniable durability and relatable practicality rather than extra chilled rosé. In effect, RTIC is positioned to become the mass-to-premium brand that delivers on an emerging definition of luxury.



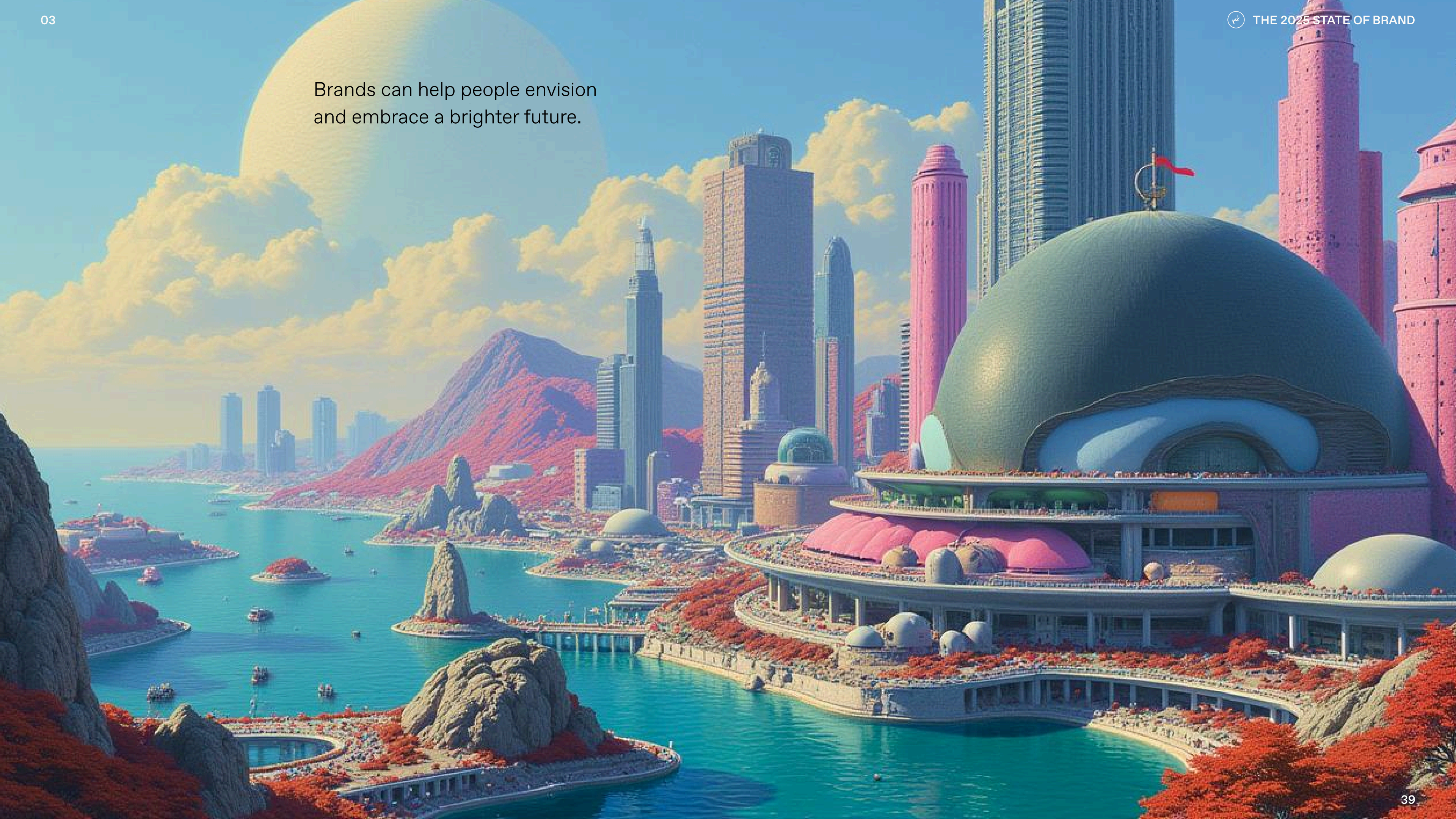
03.02

Build a prototype for society.

Reading the news, it's easy to see today's challenges as insurmountable. Progress, especially from the public sector, feels slow and bureaucratic. In 2025, we'll see brands inject inspiration into the conversation. While the world's problems can't be solved by the private sector alone, brands can help people envision and embrace a brighter future.



Brands can help people envision
and embrace a brighter future.



EXAMPLE

Cost Plus

Mark Cuban's Cost Plus Drugs manufactures generic medication at a fraction of the cost, sparking a conversation around negotiating drug prices. Unburdened by political gridlock and red tape, brands can (and should) be first movers in demonstrating what the future can be.





“

When we started, a drug for (chemotherapy) was going to be \$2,000 if you walked into a pharmacy. You go to CostPlusDrugs.com, it's under \$30 ... Of course it's legal. That's good old American capitalism.

MARK CUBAN

03.03

Counterintuitive KPIs.

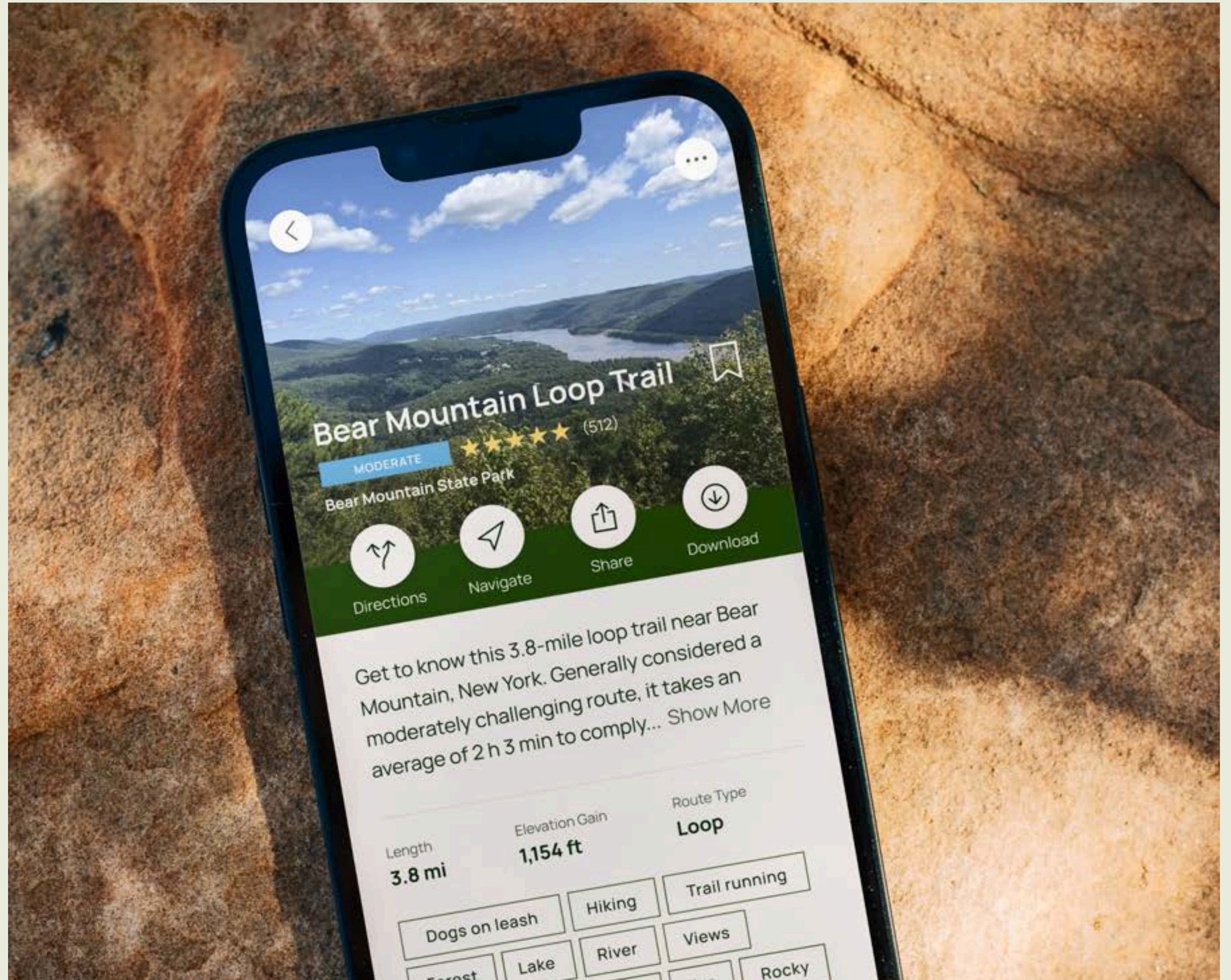
Consumers are increasingly aware of (and disturbed by) their screen addiction. They've become perpetual digital declutterers, not only removing apps that aren't useful but also the ones with a million features that make them feel trapped. In 2025, brands should break the digital hamster wheel and think of the digital experience as a brief stopover en route to the final destination: your brand promise.



EXAMPLE

AllTrails

Full of route information and adventure inspiration, the fundamental goal of AllTrails is to get more people outside. Last year, it embraced wearable technology so people can stay rooted in the moment, not glued to the screen. The KPI for success is not short-term app engagement; it's long-term outside engagement.



Take it with you.

Amid the many questions that have compounded over the last few years, the way forward for brands in 2025 is refreshing—and we think incredibly energizing.

Embrace randomness.

Own your authority.

Do a little less.

Embody optimism.

And let humanity shine.

In every experience we create, we can build a future we all want to live in.





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PRESENTED BY RED ANTLER

