

The Vibe Shift

After the end of history



March 2025

12 ways in which society is changing



“To understand politics, you have to understand vibe shifts. The vibe shift hit American politics on the night of November 5. What no one foresaw was that it would almost immediately go global, too.”

• *Niall Ferguson, Historian*

Welcome to the Vibe Shift



Old vibe Nike



New vibe Nike

There is a vibe shift underway in the West

Everyone says so, so it must be true. After all, that's the nature of vibes.

But how are vibes shifting and who cares?

Let's do the unthinkable, and pin down the vibes.

What follows is a value-free analysis of what is happening.

“We are all anxious about the future of Europe. My concern is that, over time, we will inexorably become less prosperous, less equal, less secure and, as a result, less free to choose our destiny.”

- *Mario Draghi, former European Central Bank President*

Vibes do not shift often

Vibe shifts are not a short-term trend. They are a long-term cultural realignment.

When new or discarded ideas and aesthetics become mainstreamed.

Debate remains fierce and policies come and go, but the priors change.

New economic and social incentives are created, which people follow.

But vibe shifts are not organic. Culture is downstream from power.

This vibe shift began in earnest in 2022, with the invasion of Ukraine, the acquisition of Twitter and the release of ChatGPT, marking the end of old, comforting assumptions.

TRENDSBOTTING | FEB. 16, 2022

A Vibe Shift Is Coming Will any of us survive it?



By Allison P. Davis, features writer for New York Magazine and the Cut. ▼

We've been living in a Boomer vibe

“Like the Victorians, the Boomers, have been a dominant cohort, with influence beyond the normal generational allotment. Each passing decade has been defined by what the Boomers were doing during it: Watching TV in the suburbs in the 1950s, rocking and rebelling in the 1960s, taking things too far in the 1970s, buckling down and making money in the 1980s...

“This kaleidoscope of stereotyped images shows not America passing from one generation to another, but a single generation moving from one phase of life to the next.

“If it is hard to accept, it is only because the boomer revolution has been so comprehensive that it has become almost impossible to imagine what life was like before it.”

- *Helen Andrews, ‘Boomers: The Men and Women Who Promised Freedom and Delivered Disaster’*



Helen Andrews, Journalist

The Boomer world was built different

The Boomer vibe was shaped by

Mass prosperity

The Liberal (American) World Order

Television

The Post-Boomer vibe is shaped by

Mass insecurity

The relative decline of the West

Digital networks

Leading to

Institutional trust, social cohesion, belief in liberal progress, the end of history

Leading to

Systemic distrust, polarisation, Romanticism, realism

The new vibe is a reaction to the old vibe

“Being willing to fight on the side of thoughtful liberty is much more valuable. Especially since most people don’t want to do it. And it really does reshape how people see things if you win.”

- *Alex Karp, Palantir CEO*

“There are obviously things that I’ve shifted on. You could point at a floor lamp and be like, ‘Neo-colonial ideology.’ I reflect on the last 15-odd years and say: ‘What happens if I try to look at this through a rigorously materialist lens? ‘Where does that get me?’”

- *Ash Sarkar, Journalist*

Wokeism was the apotheosis of Boomer liberalism. An acceleration that hastened its decline and triggered a backlash.

It mobilised a Gen X counter-elite, who are now taking control of the levers of power.

And it energised a Gen Z counter-culture, eclipsing the Millennials, who are now busy with the daily grind.

The new vibe can be seen in 12 changes, from international relations and business to entertainment and aesthetics.



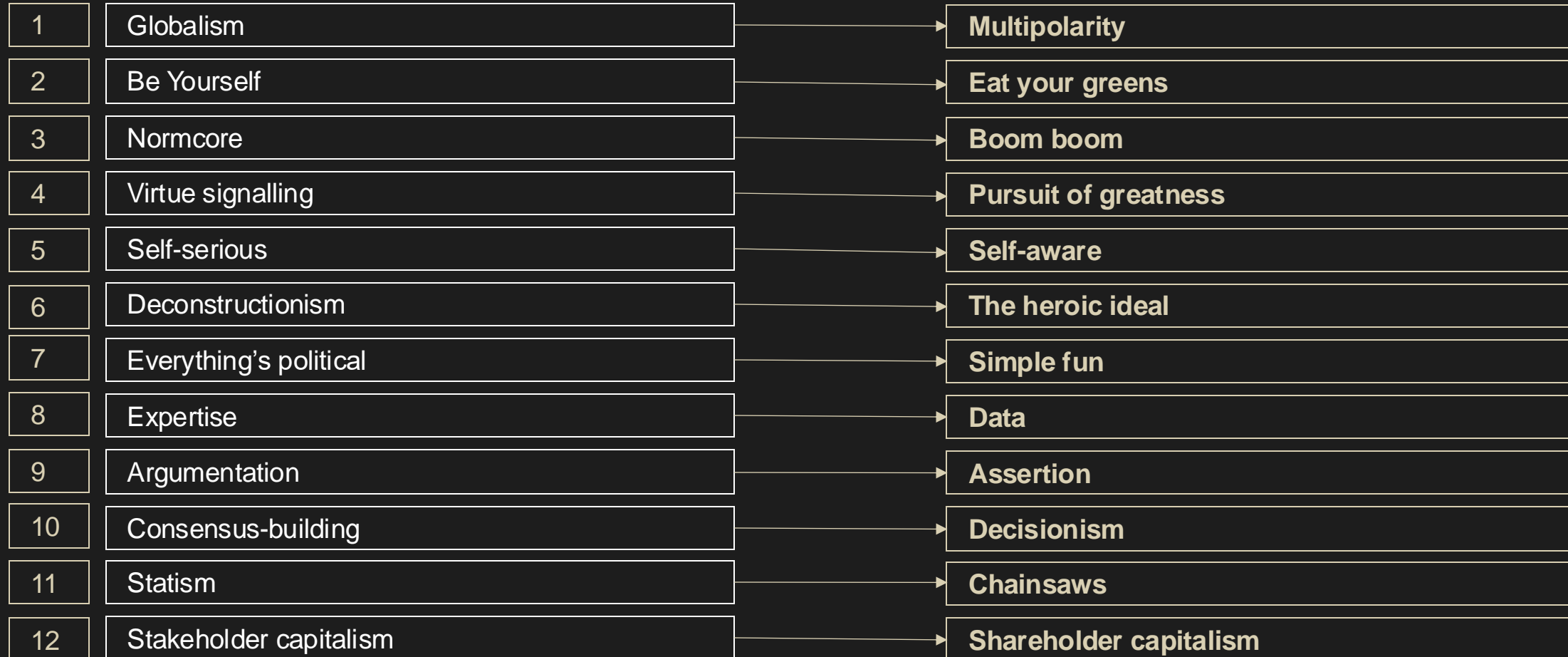
Elon Musk, Gen X



Brett Cooper, Gen Z

The Western vibe shift

From the end of history to fierce competition



1.

From globalism To multipolarity

“We are in a new era, where international relations aren’t determined by rules and multilateral institutions. They are going to be determined by strongmen and deals.

“The old world was based on a unipolar moment, where America had the means and the will to assert itself across the world, creating what we call globalisation. We’re not going back to that world.”

- *Sir Alex Younger, former Chief of the Secret Intelligence Service of the UK*

The White House bust-up between Trump, Vance and Zelensky provided the most dramatic example of a new world of strongman diplomacy and visible danger.



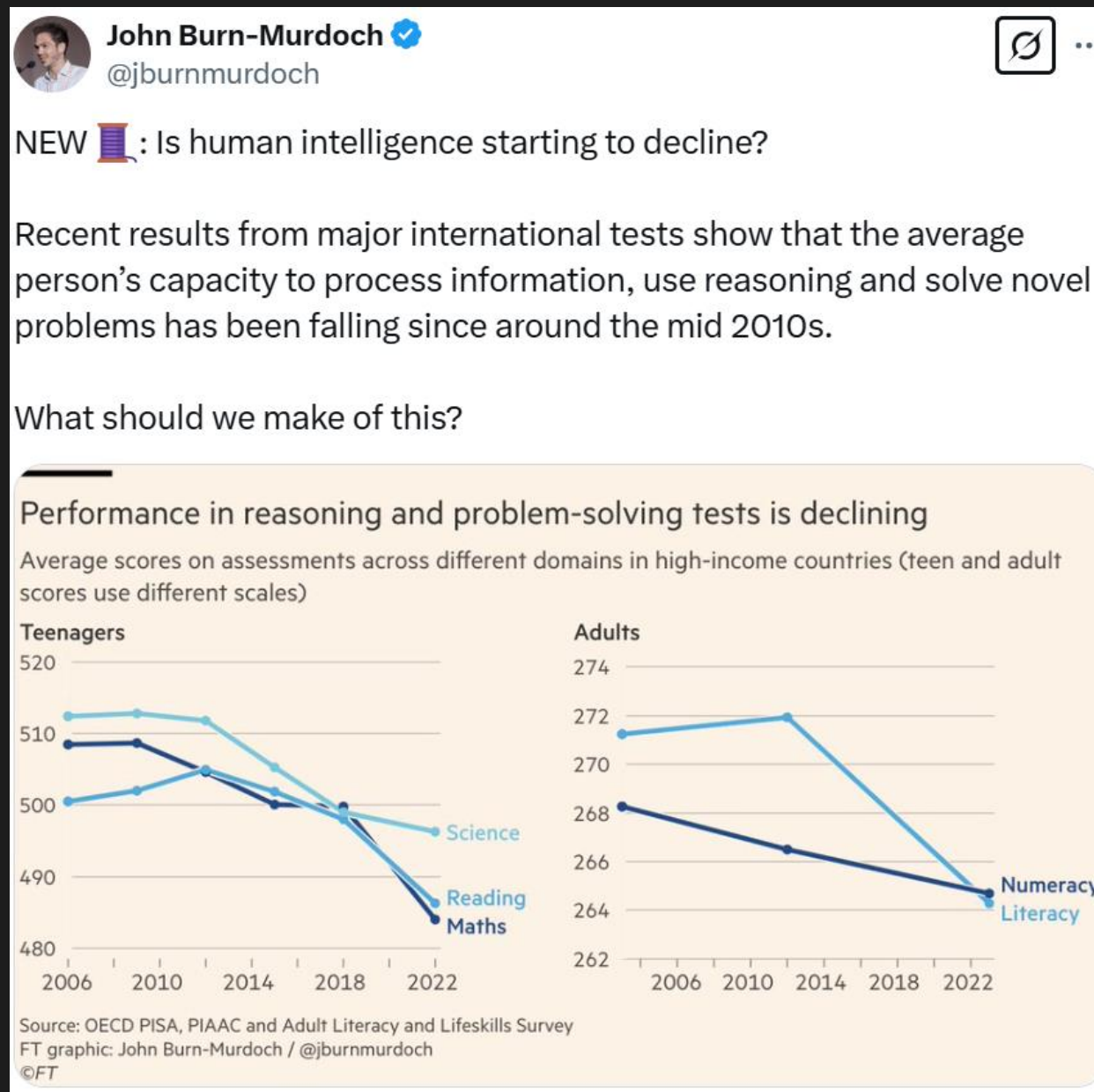
2.

From be yourself To eat your greens

“But the system is failing the very people it is supposed to help, and holding our country back. Millions of people who could work trapped on benefits... denied the income, hope, dignity and self-respect that we know good work brings..”

- *Liz Kendall, Secretary of State for Work and Pensions*

After years of criticising oppressive norms, elites are talking about human capital again, from obesity to intelligence. In response to a more perilous world, governments are toughening up.



3. *From normcore To boom boom*

“Monahan claims that participation in boom boom doesn’t reveal any political allegiance; it isn’t “owned by conservatives,” he told me. He thinks millennials of all political persuasions, after aging out of normcore... are trading in their sneakers for more grown-up signifiers in an “attempt to figure out what adulthood looks like.”

- *Emilia Petrarca, Journalist*

Slacker culture is in retreat, replaced by a more grown-up aesthetic for a world where, thanks to AI, no one knows if their job is safe.



4. *From virtue signalling To the pursuit of greatness*

“I know we’re in a subjective business, but the truth is I’m really in pursuit of greatness. I know people don’t usually talk like that, but I want to be one of the greats. I’m inspired by the greats. I’m as inspired by Daniel Day-Lewis, Marlon Brando, and Viola Davis as I am by Michael Jordan, Michael Phelps, and I want to be up there.”

- *Timothée Chalamet, Actor*

The ambitious aesthetic of boom boom has been joined by a new, nakedly ambitious attitude. Winning is cool again.



5. *From self-serious To self-aware*

“If you love me right, then who knows?
I might let you make me Juno
You know I just might
Let you lock me down tonight
One of me is cute, but two though?”

• *Sabrina Carpenter, Singer*

At the same time, celebrity grandstanding is increasingly rejected,
leading to a self-deprecating new wave, as Influencers draw level with
(and eclipse) the star system.



6. *From deconstructionism To the heroic ideal*

“We're dealing with Superman, this symbol of really old-fashioned values and hope, and it's an idea that's been a bit battered over the years. Both that sort of concept of Superman and the concept of just kindness in general.”

- *James Gunn, Director*

The rebooted Superman returns the character to his bright, wholesome roots, as a counterweight to the deconstructionism that has dominated popular culture for decades.



7.

From everything's political To simple fun

"I hope that games like Space Marine 2 and Wukong are the start of a reversion to a time when games were simply about fun and immersion... [some games] made me want to cry with their overblown attempts at messaging or imposing morals on gamers. We just want to do some glory kills and get the heart rate up a little."

- *Matthew Karch, Saber Interactive CEO*

Asian brands, from Genshin Impact and Wukong (pictured) to Squid Games and One Piece, have capitalised on consumers' weariness with the heavy-handedness of Western entertainment.



8. *From expertise To data*

“The young Musketeers of DOGE, who apparently have your personal information at their fingertips, aren’t just inexperienced – they appear completely unqualified.”

- *Arwha Mahdawi, Journalist*

Growing distrust of claims to authority, combined with rise and rise of machine learning have tipped the scales towards the data crunchers.



9. *From argumentation To assertion*

“I don’t really care, Margaret. I don’t want that person in my country, and I think most Americans agree with me.”

- *JD Vance, Vice President of the USA*

An insecure world is an urgent world, with little time for intellectual niceties. The right has joined the left in shutting down debate over issues they consider “settled”.



Yes.

10. *From consensus-building To decisionism*

“There is no chance that I would leave that up to managers. Zero chance. I will not be responsible for a company like that, OK, and I’m sorry. Now - you have a choice. You don’t have to work at JPMorgan. So, the people of you who don’t want to work at the company, that’s fine with me.”

- *Jamie Dimon, JP Morgan CEO*

As in the political sphere, so too in the business world. CEOs like Dimon and Bezos have abandoned any pretence that businesses are democracies and are asserting executive authority.

Bezos directs Washington Post opinion pages to focus on ‘personal liberties and free markets’

Amazon executive and newspaper owner tells staff that ‘viewpoints opposing those pillars will be left to be published by others’



11.

From statism To chainsaws

“If you care about your...country, read Ludwig von Mises.”

- *Renato Moicano, UFC fighter*

Where Milei led, other politicians have followed. From NHS England to USAID, government bodies and state-backed bodies are having their licence to operate examined.



12.

From stakeholder capitalism To shareholder capitalism

“This is a reset bp, with an unwavering focus on growing long-term shareholder value. This strategy will see bp grow its upstream oil and gas business, focus its downstream business, and invest with increasing discipline into the transition.”

- *Murray Auchincloss, bp CEO*



A reset bp

As interest rates have risen, choices have come into sharper focus. Investors have moved away from growth and social impact metrics, and back towards traditional shareholder value models.

Adapting to the new vibe

“With sports as our North Star, we will re-energise our culture and identity.”

- *Elliott Hill, Nike CEO*

Many are emotionally, intellectually and commercially invested in the old vibe, and grieve its passing. Their reaction has ranged from denial to depression, with occasional outbreaks of anger.

Comms people flee to Bluesky as CEOs hide from clean energy photocalls, lest Trump’s Eye of Sauron falls on them. References to DEI and ESG in earnings calls, annual reports and keynotes have declined as quickly as they ascended. Some think they can just hunker down for four years until the old normal returns, others think if they had more YouTubers and podcasters on their side, everything would be OK.

This is delusion. The vibe shift predates the Trump Presidency, and will outlive it. We need to move to acceptance.

Effective navigation of the new vibe does not mean throwing out good ideas and abandoning deeply-held values. Fairness, clean water and human dignity are no less important, whatever the vibe.

However, adapting to the new vibe does mean listening to and engaging with new voices, modifying your tone of voice, broadening your frame of reference, and restating your best arguments in new way.

Above all, it means working out how your goals are consistent with the needs of a more insecure world.



Get in touch

Nick Barron

Deputy CEO

nick.barron@mhpgroup.com

Thank you.

