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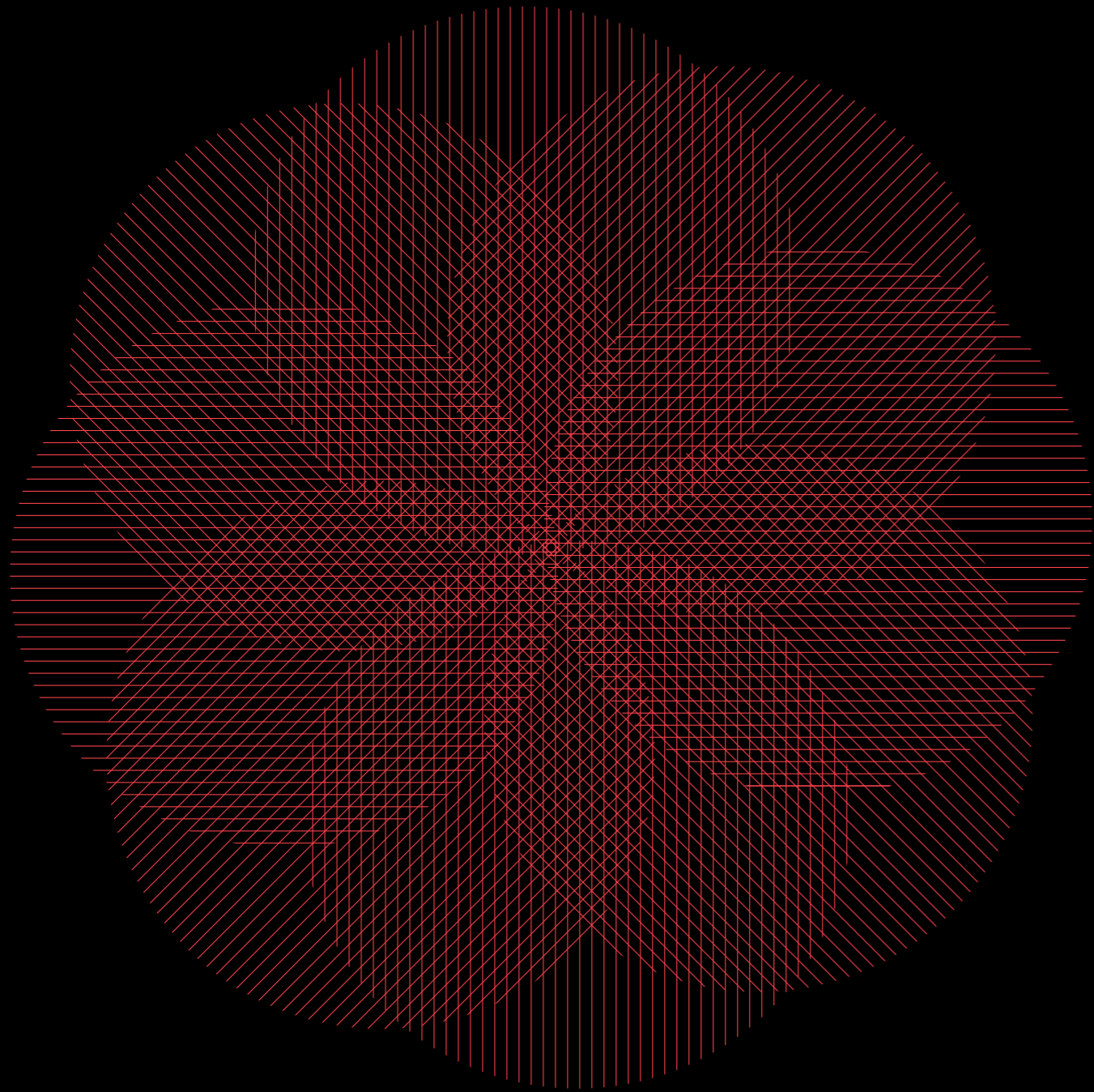
TRENDS
SHAPING
SOCIAL
IN 2019

**we
are
social**

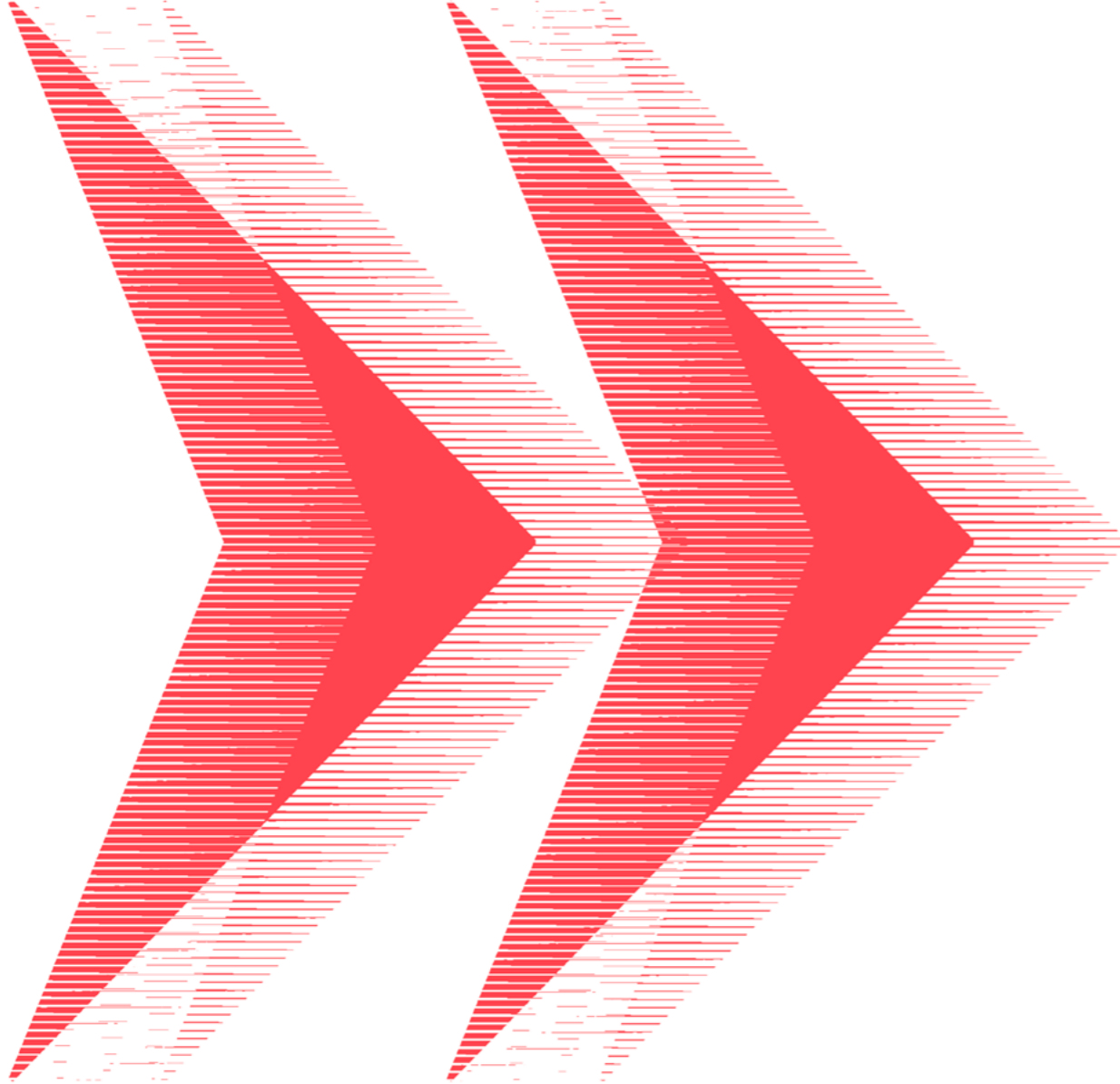


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**THINK
FORWARD**
2019



**RECLAIMING
OUR SENSE
OF SELF
THROUGH
SOCIAL
MEDIA**



NOT JUST ANOTHER TREND REPORT

**we
are
social**

Social media is the ultimate representation of globalisation and its gradual blending of cultures. Apart from a handful of authoritarian states, the world is now ostensibly borderless. The ability to engage in conversations with people thousands of miles away, and share similar experiences with different cultures, has been a driving force behind the proliferation of platforms like Facebook and Twitter. Things have been moving at 100 mph.

But in 2018, the brakes were slammed hard. And some brands - including ones as big as Facebook - were left with their noses bloodied. Huge numbers of people have felt their identities to be under threat - politically, from surveillance and data capture; culturally, from appropriation and homogenisation. Now they want it back. As a result some have rallied against social entirely. Others have used it as a forum for change. Many have engaged in a backlash against big data.

Amidst the crisis, brands are expected to have a voice that speaks directly with consumers, as well as a role in driving cultural change. Online marketing is more fraught than ever. Many brands are struggling to find their place for fear of igniting outrage or alienating their audience. People expect honesty. Proper representation. Innovation that's balanced with responsibility.

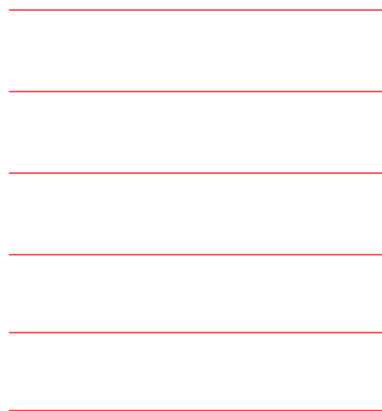
We connect people and brands in a meaningful way. That's why our 2019 Think Forward report unpicks the complex and ever-shifting web of consumer identity and looks at the role brands play in reflecting and shaping it. We'll arm you with everything you need, from insights into raging culture and gender debates to the new rules of data. There's even AI marketing and a robot influencer or two. Because if there's one thing we've learned about the 2019 identity crisis, it's that the solutions lie in digital innovation. We'll see you in the near future.

WHAT'S INSIDE THIS REPORT

Social media isn't simply a collection of platforms driven by data. It's a global community powered by people. That's why our report is built upon the human needs underpinning consumer behaviour online.

THESE ARE THE SOCIAL DRIVERS BEHIND THE TRENDS.

Understanding them will help you understand your audience's needs.



CERTAINTY

The need for safety and control

CONNECTION

The need to interact with others

BELONGING

The need to feel part of a community

STATUS

The need for validation in society

PROGRESSION

The need to grow, learn and develop

CONSCIENCE

The need to help other people

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CERTAINTY

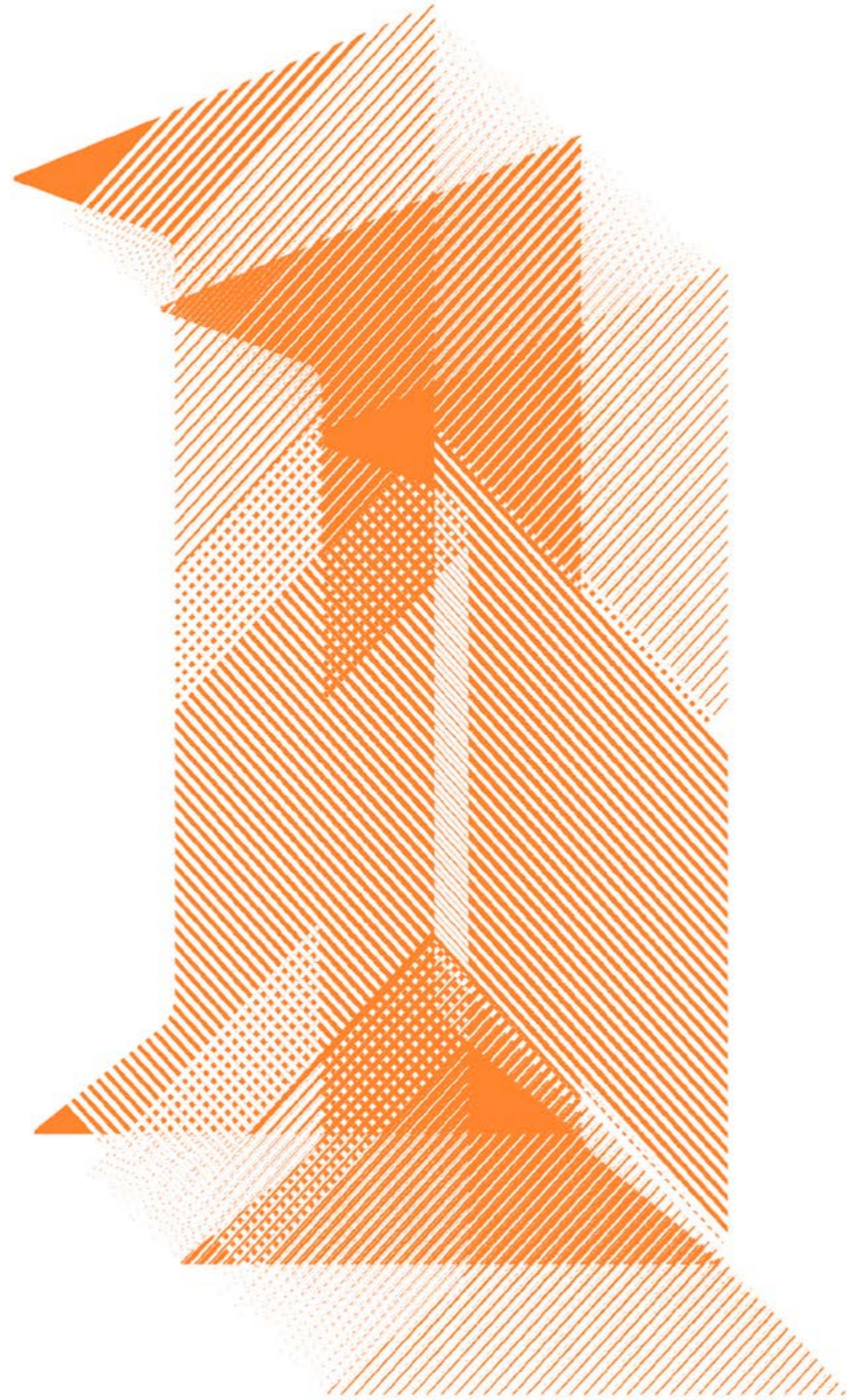
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RIGHT NOW CROWD

Live video is creating mass-participatory moments and big conversations on social

CONNECTION



Brands are apt to stay quiet in the face of online hatred. But as 2018 turned the volume up to 11, some decided to shout back, no matter the consequences

SOCIAL STANDINGS



KNOW IT

Understand the trend

In the age of populist politics – of fake news and echo chambers and bot farms – social has been both the arena for and starter pistol to the normalisation of vitriol. A study published in Social Science Research Network found that US president Donald Trump’s anti-Muslim tweets strongly correlate with an increase in anti-Muslim hate crimes. Psychologists and technology theorists alike suggest that the confirmation bias fostered by social, alongside the spreading of misinformation, is encouraging extreme values and behaviours.

It paints a gloomy picture. But 2018 was also the year that many brands fought back. Levi Strauss, a company with a firm stance on gun control, brought their values to their consumer-facing comms. They started a fund for nonprofits engaged in ending gun violence, launched alongside Michael Bloomberg a coalition of business leaders who want further gun control, and developed employee initiatives including paid volunteer time for activism work.

And they made noise about it, despite public backlash and personal death threats to their CEO. But Levi Strauss has taken unpopular positions before – integrating factories before the Civil Rights Act was passed; offering benefits to same-sex couples long before other companies – and it’s always

paid off. In this, as in their previous stances, they’re likely to be vindicated again.

If the Levi Strauss backlash was severe, then that after Nike’s Colin Kaepernick campaign was vicious. Since taking a knee in protest during the US national anthem, Kaepernick has become the poster boy for standing against the rise of bigotry – online and IRL. Brands would usually steer clear of this kind of controversy – particularly around a subject as sensitive as race – but Nike chose to take a knee with him.

“Believe in something. Even if it means sacrificing everything,” the campaign slogan

“As business leaders with power in the public and political arenas, we simply cannot stand by silently when it comes to the issues that threaten the very fabric of the communities where we live and work.”

Chip Bergh **Levi Strauss CEO**

read. It looked like Nike sacrificed a lot. Incensed consumers used social media to show themselves destroying Nike products with the hashtag #justburnit.

But their public stance on hate speech paid off. A chunk of their customer base decided to boycott the brand. But the increase of \$6.38 billion to the company’s sales – and the consequential stock surge – suggests that leaving them behind was not only a branding power move, but a profitable one to boot.

Others have gone a step further, not only bringing hate speech to the front of their comms, but to their product as well. Diesel – a fashion house never far from controversy – decided to quite literally wear their heart on their sleeves with their recent Hate Couture campaign. Amassing troll comments received by the brand and some of their celebrity ambassadors, Diesel created limited-edition garments emblazoned with some of the hate speech, later worn by the likes of Nicki Minaj and Gucci Mane in a series of films shared online.

Here, Diesel has not only actively engaged with vitriol, but turned the discourse on its head – despite the risks, despite the backlash – and made policing social channels not just a public act, but a fashionable one at that.

TREND

1

USE IT

Make it work for your brand



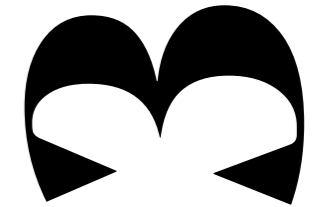
MAKE YOUR VIEWS PUBLIC

“If you have created a space, and you’ve created a conversation, you have a responsibility to the people who come to that platform,” says Kate Dale of Sport England. It’s no longer enough to simply have brand values in the back of your mind. They need to come front and centre in the form of a publicly available anti-hate policy. And one that’s acted upon in social.



THINK LONG TERM

Chip Bergh, the CEO of Levi Strauss, sees acting upon brand values as playing the long game. Taking a stand now, when it’s unpopular to some (or indeed many), may be painful in the short term, but you’ll come out on top in the end.



KEEP IT CREDIBLE

Nike entered a conversation they had the credibility to get involved in – within sport, concerning a famous sportsperson. Brands must be careful to avoid coming across as inauthentic. It’s important to avoid perceptions of commercialising social justice and political theatre.

6.25%

Nike's stock value increase in the wake of the Colin Kaepernick campaign



Honesty is currency in social. But 2018 was the year we cashed in on deliberate inauthenticity and fictional personas as well. This fakery poses some very real questions for brands

FAKE AUT HENT TICI TY

The word 'FAKE AUTHENTICITY' is written in a tall, condensed, black serif font, stacked vertically. A diagonal orange line, matching the color of the '2' on the left, cuts across the text from the bottom left to the top right, passing through the middle of the letters.

KNOW IT

Understand the trend

Miquela Sousa – or Lil Miquela as she’s known to her 1.5 million Instagram followers – is, on paper, your run-of-the-mill millennial influencer. She’s edgy, listens to the latest music, endorses aspirational products and sports the kind of thumb-stopping outfits likely to make you part with your cash. She’s even released her own single.

All that insta-fame, despite being a complete fake. Her endorsements may be legit, but Miquela isn’t real at all. She’s a digitised fiction, the brainchild of an artist whose anonymity leaves his or her motivations unclear. Miquela is perhaps the natural progression of online personas, an avatar writ large – albeit an entirely lifelike one – who’s sat upon an Instagram empire. This poses a very real question for brands. If consumers back Miquela, then does fakeness even matter?

It certainly mattered to Rihanna’s fashion brand Fenty. After reposting Instagram content from the model Shudu – who has near to 150,000 followers – Fenty soon discovered that, like Miquela, she doesn’t actually exist. They were quick to delete the post and have since declined to comment. Perhaps they discovered that Shudu was in fact the creation of a white male, which doesn’t align with their brand values of empowering people of colour. Maybe they’re

“There are many business and legal issues to consider before we can declare that virtual influencers will put the humans out of business.”

Heather Nolan partner at InfoLawGroup, Aduweek contributor

embarrassed at having the wool pulled over the eyes of their social media team.

You can hardly blame them for being duped. Much like Miquela, Shudu is so lifelike it’s almost impossible to discern the inauthenticity. But the novelty – or perhaps the statement – of working with a digital fake has still been irresistible to brands. Miquela has appeared on the cover of street culture magazine *Highsnobiety* and modelled for Prada, while Shudu, dubbed the ‘digital supermodel’, has strutted 3D fashion shoots and worn Balmain.

It’s a definite left turn as all other brands go right. We’ve hitherto focused on authenticity as the primary currency on

social. And with good reason. The recent backlash against a Listerine influencer ad is a pertinent cautionary tale as to why. The highly curated, impossible set-up of Scarlett London’s bedroom, and the incongruous placement of the Listerine product among her ‘aspirational’ paraphernalia, left Johnson & Johnson in a social media storm.

The ad went viral and consumers were frothing. It came with a painfully earnest message and – despite the balloons, despite the impossible breakfast, perfectly made-up influencer and even the bedspread with her face printed on it – was delivered with what we were meant to believe was authenticity. We were supposed to see it as real. But it was duplicitous in the way only influencer fakery can be. Something that social-savvy consumers are more than wise to.

And yet they welcome the likes of Miquela and Shudu with open feeds. It feels like a paradox. But the learning for brands here is not necessarily one of fake versus real – it’s apparent that, done properly, both are fine – but rather one of intentions. Put out comms with the intention of duping consumers and suffer the consequences. Give them deliberate fakery that reflects avatar culture, and you might just come across all the more real for it.

TREND

2

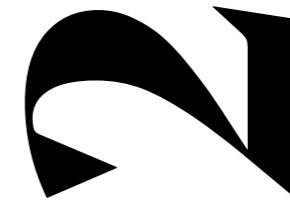
USE IT

Make it work for your brand



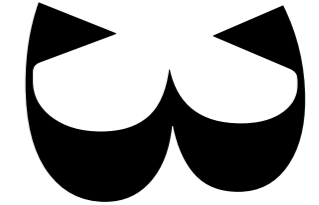
KEEP YOUR FAKENESS REAL

Synthetic authenticity is honest fakery. We know from the negative responses to some influencer advertising that people are fed up of overly contrived stories purporting to be ‘real’ content. Instead, be honest in your intentions. Being deliberately fake, and indeed owning it, speaks to avatar culture and will have a better response than inauthentically trying to make the impossible look real.



PLAY A DIFFERENT GAME

For a recent SS campaign, Louis Vuitton used the main female character from the video game series Final Fantasy to model their collection. The heroine was, in the brand’s own words, the perfect avatar for a heroic woman in a world in which social is woven into our lives. Digital avatars abound – in games and CGI films. Consider them for your comms. They could be more cost-effective than real-life celebrities, too.

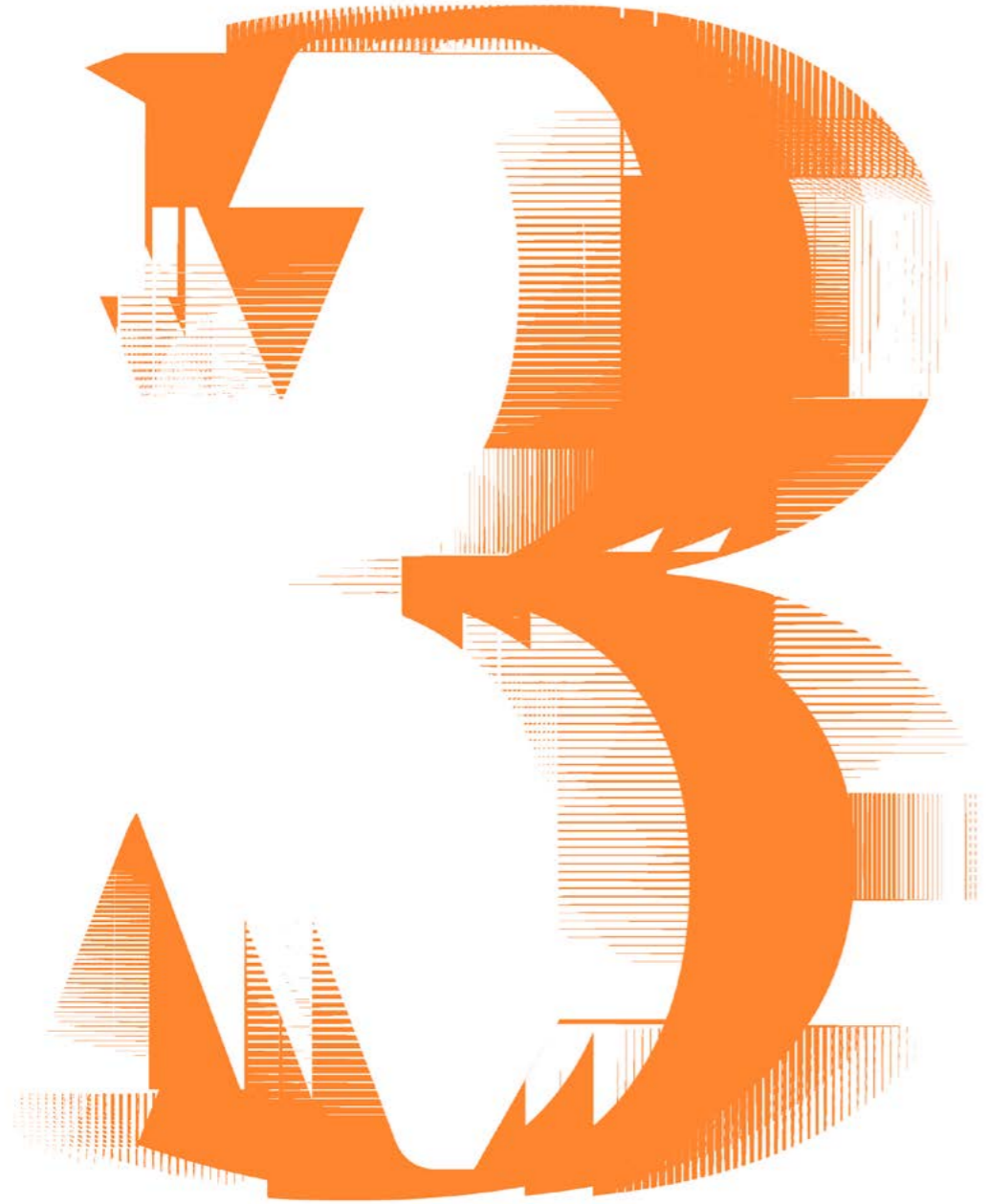


KNOW YOUR AVATAR

The legal and moral lines upon which virtual influencer marketing teeters are still being drawn. Until its use becomes commonplace there’ll be pitfalls on either side, so be as clued up as possible when considering your involvement. Knowing who’s behind the influencer should be priority one. If, for example, it turned out that the mysterious Lil Miquela was a Banksy-style statement on the shallowness of influencer culture, associated brands could end up with their reputations put through the shredder.

1.5M

Lil Miquela's
Instagram following



At a time when many consumer groups are resisting globalisation - on social and IRL - tapping into locality could mean more meaningful connections with your audience

LOCAL LEGITIMACY



KNOW IT

Understand the trend

As globalisation seemingly hits critical mass – when people are tightening borders and making nationalism great again – many have started to fight back against the homogenisation of culture and our seemingly non-existent societal boundaries.

At the forefront of this, individuals are rekindling – or perhaps finding for the first time online – a love for locality. Not just for countries but for cities and towns as well. Place, it seems, will matter more in 2020 than it did in 2000. People are identifying with subcultures based entirely on locale. And individual identities are becoming more localised as a result.

It's perhaps most apparent in grassroots movements that protect local environments and businesses against gentrification and corporate invasions. People give voice to local discontent through the international loudspeaker of social media. And these small sparks of community togetherness can spread like conversational wildfire.

The 'Make Bristol Shit Again' movement started as a sticker on a bin and grew into a Vice article and hashtag for content resisting the city's gentrification. It became a beacon for true Bristolians fighting against the city's inexorable sterilisation. The slogan later inspired similar movements, with 'Make Peckham Shit Again' even finding its way onto highly instagrammable clothing.

“Through social media you can access the world. You can travel without travelling, and have friends all over, which makes you more careful about your local surrounding and your localness too.”

Asa Caap **Our/Vodka co-founder**

Peckham is a London district succumbing to gentrification at a rate no grassroots movement could stop. But despite these pockets of resistance, Londoners as a whole have a strong and united identity. At least, that's what Nike would have you believe with Nothing Beats a Londoner – a campaign showcasing all quarters of the city as part of Nike's urban culture story, wholly predicated on the pillars of identity and local legitimacy.

The hero TV advert was a huge success. Nike successfully spoke to a subculture – granted London's 8.8-million populace isn't exactly a small group – in a legitimate way, while still maintaining international appeal. It's a

tough thing to balance. But they galvanised locals and even enticed non-Londoners with a fetishisation of London culture that bordered on myth.

But locality isn't just about culture. It can be about goods, too. Bringing a product's origins to the front and centre of marketing is nothing new. But homing in on local provenance on a global scale is another beast entirely. Even huge multinationals like McDonald's have achieved this with great success. Their campaign 'That's what makes McDonald's' focused on the use of regional farm produce to reassure consumers about the quality of their food, leveraging the trustworthiness of local with huge reach.

Aiming local can be beneficial on a smaller scale, too. While most companies are all about big data, going niche is increasingly desirable. Tolemi, an intelligence company that integrates city data from multiple departments and systems, seeks to help governments understand things on a smaller, more localised scale so they can have a bigger, more localised impact.

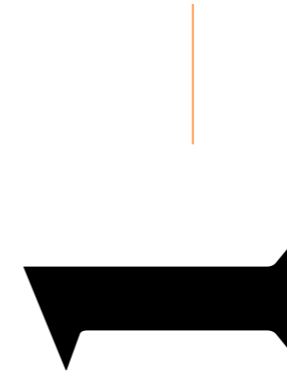
Meanwhile, platform innovations like dynamic ads are making localised content more seamless. Should your brand be involved? Definitely. Putting it into practice when you have a centralised strategy can be challenging. But as social media breaks down borders, mirroring this consumer leaning towards localised content and stories could boost your cut through.

TREND

3

USE IT

Make it work for your brand



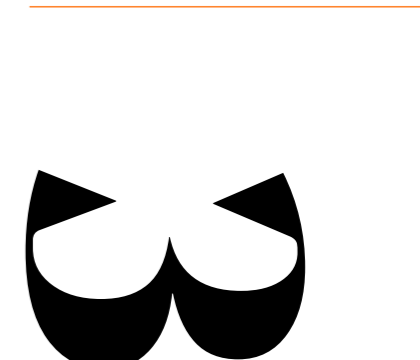
BE GLOBAL IN OUTLOOK, LOCAL IN ATTITUDE

You don't have to be a small business to have local legitimacy. If any of your brand stories are rooted in a local area then you can leverage this with content tailored to its populace. adidas does this well with adidas Runners – a global community broken up into urban teams. It celebrates real people and their cities, giving the brand local legitimacy around the world by using legitimate locals.



KNOW YOUR AUDIENCE

While Nike's London campaign was a success, it didn't come without controversy. Doubling down on locality opens you up to double the scrutiny, as Nike found out after backlash from the Southern Asian community who, despite being a big part of London life, felt they weren't represented in the ad. Understanding local nuances requires a more granular approach to research. If you're going to do it, make sure you truly know the market first. If nothing else, you'll turn up valuable local insights.

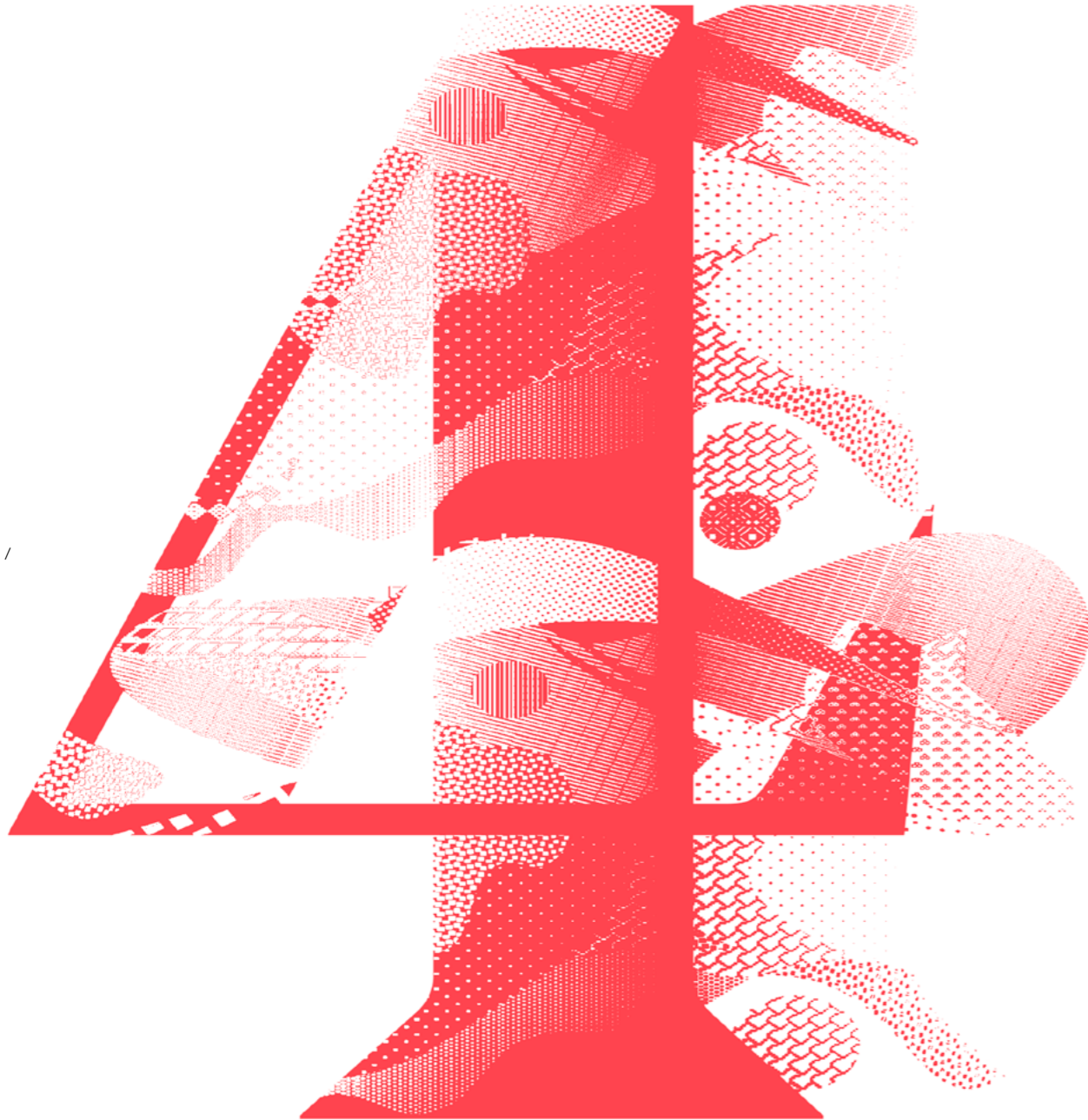


USE LITTLE DATA

Instead of focusing on the usual metrics, consider breaking your data sets down into more area-specific information. Cities with entrenched cultural narratives may respond well to marketing that taps into those specific stories. Dynamic ads – which can be tailored to the end user based on their data – are the perfect way to give a national campaign local nuances.

64%

How many people feel that the area they live in is important to their sense of identity - Foresight Factory study



As we converge and combine our behaviours and intelligence online, the ability for machine learning to find solutions to brand needs is becoming an essential advantage

COLLECTIVE AI



KNOW IT

Understand the trend

The robots are taking over, but not in the way you might think. Instead of machines trying to subjugate humanity, we have machine learning making our lives easier. And as we become more and more connected – amassing our collective behaviours and desires and intelligence online – the potential for AI to see patterns and for brands to act on them is seemingly endless.

AI experts would tell you that this learning, while impressive, is in its infancy. But many brands are already finding meaningful applications with tangible results. And to do so makes total sense: crowdsourced information processed via machine learning offers a zoomed-out picture of the wants, needs, identities and purchasing habits of your customer base en masse. It's like shrinking everyone down into an easily digestible, data-heavy spreadsheet and spotting the opportunities. Because, in essence, that's exactly what it is.

One company wasting no time in utilising this rise of the machines is sportswear and fashion brand New Balance. At a recent New York Fashion Week, to support their campaign Be The Exception, New Balance set up a 360-degree view of the streets of SoHo and captured the getups of those in attendance and thousands of passersby.

Instead of combing the crowd for trends and

constants – of which there were many – the system was logging the anomalies. With AI, New Balance were able to find people who quite literally stood out from the crowd. These people were tagged as trend setters and gifted a free pair of Fresh Foam Cruz Nubuck trainers. New Balance effectively turned machine learning into a headline-grabbing PR stunt.

“Instead of replacing marketing functions, [AI is] taking on the drudgery and heavy lifting, saving time, and hopefully enabling marketers to focus on what really matters.”

Matt Jarman - director of data, analytics, insight and visualisation, Caci

Bustling throngs of people in New York may seem like large-scale crowds, but that's nothing compared to the big crowdsourced data handled by some digital companies. Netflix, for instance, has for some time used algorithms and machine learning to filter

the content it recommends to its audience, tailoring individual feeds based on the end user's tastes. In this sense, AI is helping to give a more streamlined and personalised UX.

At the other end of the scale, Facebook's Rosetta AI and machine learning models are constantly in effect, ranking and personalising news feed stories and automatically spotting and filtering out offensive content. Twitter and Instagram use similar techniques. AI is learning what vitriolic and insensitive content looks like and policing the internet at a rate no human team could match.

The superior speed of machine learning over human analysis can have practical results on product production, too. Fast fashion brand Myntra used their AI technology Rapid to spot and react to market trends. Their programme successfully reduced the turnaround time between spotting a trend and getting product to customers from 180 days to 35 days. In the fleeting world of fashion, this level of reactivity is a game-changer.

Whether your priority is expediency or security, deeper customer learnings or broader crowd insights, plugging into the growing trend of hive-mind AI is worth considering, before it's too late to keep up with those who already have.

TREND

4

USE IT

Make it work for your brand



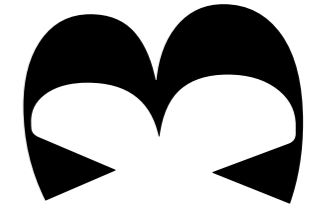
KNOW YOUR AUDIENCE

Machine learning could be – and in many ways already is – the evolution of consumer research. New Balance's NYFW learnings were a PR stunt at heart, but no less useful for it. Consider how AI could be used to supercharge your data and spot trends going forward. And indeed if there are practical real-world applications of AI to market your product.



EXERCISE CAUTION

The manipulation of data is a hot topic (see Democratising Data on p54). It pays to be transparent when handling the information you have on consumers. Exercise caution when gathering it, too. A fun PR stunt will always be received more positively than cookie mining. Look to brands with an open dialogue with how they use AI. Your comms should focus on the benefits it brings to your customers, instead of what it means to you as a brand.



PUT IT INTO PRACTICE

Perhaps the most important application of crowdsourced machine learning is in product development. Swarm AI has been shown to deliver far more actionable and watertight insights than any other form of market research, using the power of hundreds of people connected by AI algorithms into an 'emergent intelligence'. Companies like Unanimous use this to help brands predict accurate outcomes in product development and sales forecasting, in essence gifting them a crystal ball.

800%

Myntra's time reduction in getting product to customers after using AI to react to trends



In the wake of #MeToo, masculinity has become an explosive topic. Brands must promote a more inclusive message if they hope to resonate with men online

NEW MAS- CUL INI TY

KNOW IT

Understand the trend

In a way, advertising's hyper masculine 'ideal' has both reflected and contributed to the formation of what's recently been dubbed 'toxic masculinity' - the catch-all term for extreme gender performance in men, covering traits like dominance, emotional unavailability and sexual aggression. It took some choice words from Donald Trump ("Grab 'em by the pussy") and the combined efforts of #MeToo to thrust the problem into the spotlight. The result has been a bit of a mess.

And a polarised mess, at that. Some men have entrenched their positions and see these discussions as an attack on masculinity itself. Others believe not enough is being done to combat toxic masculinity and want more. Social media has become the flashpoint for this new wave of gender warring.

“When your [brand’s] reason for being is predicated on inclusiveness, you can’t ignore that many men in our society are made to feel like they don’t fit in.”

Joseph Saroufim - creative director of the #EvolveTheDefinition campaign

It's a frustrating moment for feminism. A confusing time for young men. And a precarious landscape for brands trying to understand how masculinity should be portrayed in their marketing, which can often end up caught in the melee. Should you sanitise your comms of anything that could be considered a generalised representation of men? Or do you throw your brand into the fray with one firmly held stance?

It's not all doom and gloom and biceps. In the midst of online aggression, calmer heads can prevail by promoting a message of inclusivity. One that presents a more complex, layered version of masculinity. Perhaps the best role for brands is one of stealthy mediation.

Bonobos - a fashion brand built on being for the every man - took that challenge head on with their latest campaign and sought to #EvolveTheDefinition of masculinity by encouraging conversations around what it means today. The response showed that the reality has moved on from the long-held fictions we often see in traditional advertising.

In a series of 172 interviews, Bonobos asked real people - including men, trans men, and women who identify as masculine, across a spectrum of races and age - how they define masculinity. The answers were as varied as they were poignant, and included more inclusive, accepting definitions

that challenge many of the traditional preconceptions propagated by advertising and entertainment media.

Similarly, Mercedes' Tough Conversations campaign in Australia - a country with strong traditional masculine ideals - aimed to challenge preconceptions and redefine toughness. The strategy was to breathe new life into the tired utility vehicle (ute) category - one dominated by images of ruggedness and strength - with a new vision of what masculinity means. In place of brawn, the ads focused on things like resolve and strength of character.

This progressive exploration of modern masculinity serviced a male consumer who had long felt ignored. One who's sick of trite razor adverts and magazines telling him he should smell like leather and petrol. It certainly serviced the product objectives, too. The campaign yielded a huge ROI for Mercedes.

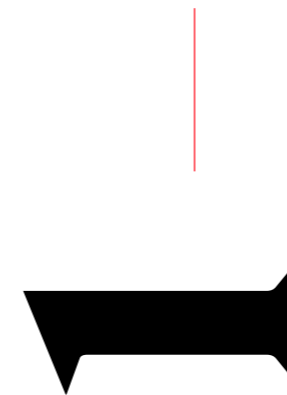
It's clear, then, that men are ready for the marketing they consume to be dragged out of the '80s and into a more inclusive discourse. The role brands play isn't a meagre one. As content producers that speak to the intrinsic motivations driving men on a daily basis, it's the collective responsibility of brands to focus on the similarities between the genders, not the differences, and to build on the multifaceted masculine realities, instead of reductive - and outdated - ideals.

TREND

5

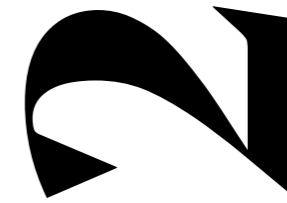
USE IT

Make it work for your brand



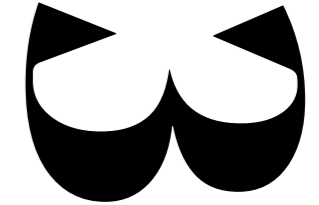
TALK LIKE A REAL MAN

A more nuanced approach to targeting men in advertising is essential not only for the continuation of the detoxifying masculinity movement, but to properly resonate with modern male consumers as well. Consider the underlying messages coming through in your comms, and the roles men play in them. Diversifying the vision of masculinity you offer will speak to a more diverse consumer.



SQUASH GENDER STEREOTYPES

Where most women grew up surrounded by Barbie and skinny models, men had Action Man and buff superheroes. There's a growing understanding of how a man's mental health is affected by impossible ideals in the same way as a woman's. Consider diversifying the types of men shown in your advertising, and avoid equating things like muscularity and height to masculinity.



DETOXIFY WITH CARE

If as a brand you decide to stand against toxic masculinity, be nuanced in your messaging, as it could backfire. Not all masculinity is toxic. And many men feel attacked by the backlash. Social media often becomes a battleground for this debate. Don't let your channels get caught in the crossfire.

100,000

The number of leads for the Mercedes ute after the Tough Conversations campaign

'Niche memes' have become a way for young people to close off outsiders and share vulnerabilities as well as in-jokes. Some brands have used them to foster deeper connections with hard-to-reach audiences

MIE MIES GO NIC HE

KNOW IT

Understand the trend

Memes are a tricky territory for brands. Used well – like Heinz’s highly successful meme-focused campaign ‘Fruit or Vegetable?’ – they can improve brand perception and be a way into some of the biggest conversations on the internet. But using them incorrectly is the social media equivalent of telling everyone, “I’m not a regular mom. I’m a cool mom.” As a result you might find that your audience consists of some very mean girls indeed.

While on the surface they appear to be throwaway nonsense, memes are often complex ways for people to communicate in an organic, inherently social way. Niche memes are different to regular memes in that they don’t have mass appeal – which is exactly the point – and they take the communication to a deeper level still.

Niche memes started as anonymous Instagram scrapbooks – comprised of cluttered, clipart-style unaesthetic images – for young people to express themselves with highly personal, moment-specific moodboards. They allow teens – usually as an outlet for discussions around mental ill health – to both reflect upon and display their vulnerabilities privately within a carefully curated and supportive community. They appear even less crafted than regular memes. But in fact they’re more meaningful.

“ [Niche memes are] the first examples of Gen Z creating an impact on millennial meme culture.”

Brandon Wink founder of meme investment and trading platform NASDAQ

Users vent the stresses of things like school life and the realities of being a teenager. Gaudy compositions comprised of images ranging from emojis to products to brand icons sit under titles like, “What I actually do when I go to bed.” These convey moods and, ultimately, identities.

Chat rooms used to be the places teens would retreat to converse with relative anonymity, expressing themselves in a way they felt was impossible in school and at home. Memes, emojis and the instagramification of culture prove we now tend to express ourselves more visually. It stands to reason that niche memes are the natural progression of the sanctuary found in digital anonymity.

From this outlet has sprung an entirely new platform for young people to express themselves, and in ways that aren’t just focused on mental health. Many niche meme

accounts now boast huge reach, impacting millennials as well as teens. The Instagram account ThrowBackMachine, which has over 100,000 followers, uses the niche meme format to deliver content specific to people born in the ’90s, most of which wouldn’t be understood by an older audience.

More niche still are the parody accounts following this form. 207PoundsofShrimp is a comedy Instagram account dedicated to shrimp-related content. It’s a collection of bizarre, crudely designed meme jokes. The text is often completely nonsensical and that’s exactly the point. Similarly, same-photo-every-day accounts are dedicated to posting identical images of everything from Danny DeVito to a stock photo of a gherkin. Niche memes are designed to speak only to the audience that gets them, and to leave everyone else behind.

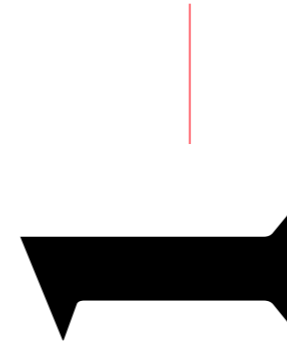
Despite being niche, these accounts are fast becoming a big way for Gen Z and millennials to connect with like-minded people through content deliberately designed not to appeal to everyone. Some brands have succeeded in involving themselves in these stylistic and conversational oddities. But much like any teen party, turning up uninvited is never a good idea. Brands have a challenge if they want to end up on the guestlist of an area of the internet entirely under the control of the audience.

TREND

6

USE IT

Make it work for your brand



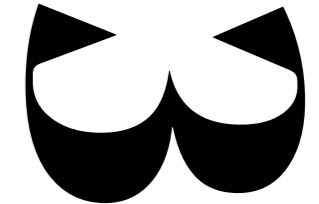
INFLUENCE THE NICHE

Some brands, in particular from the fashion and makeup categories, are already working with teen niche meme accounts like TeenGlossy to reach hard-to-target audiences. Interestingly, brands can be a natural part of teen expression in these moodboards, with some – like Netflix and even food and drink companies – becoming symbolic of moods and behaviours. If your brand has similar associations, then you too could look to these as accounts hyper-targeted influencers.



ASSESS THE ENVIRONMENT

The glaringly obvious problem with using niche memes as an outlet for your marketing is the look and feel. The visual language is deliberately lurid and tacky, the written language colloquial and lowbrow. As an environment it could be inimical to your objectives. A cobbled-together moodboard might not be the best place for a luxury fashion brand, for instance. Prioritise how an association would look in the long term over the potential short-term reach.



SEE THROUGH THEIR EYES

Niche memes are bleeding into the mainstream, with many of the formats being adopted by regular Instagram users as well. If communicating with young people in an authentic way is part of your social strategy, you could consider borrowing the visual style and conveying brand and product stories with your own niche memes. But ensure your category is one already embraced by niche meme culture.

4.1M

The number of impressions
Heinz garnered with their meme
marketing campaign, Fruit or Vegetable?



Marginalised groups are becoming the most influential microcosms on social. Brands who ignore them could be left out of the conversations driving culture

MINORITY IMPACT



KNOW IT

Understand the trend

Black Twitter. Feminist Twitter. Asian Twitter. Marginalised groups are doubling down on their identities and seeking to build and engage with their own consciously created echo chambers. Ones with power not only in their social spaces, but in the real world as well.

It's within these groups that many of the internet's most important conversations begin. But from one in particular. While the most important conversations from Black Twitter have been around issues of social justice and hate, it's also considered the internet's most impactful content machine. And it's not just mainstream consumers following their lead, but brands as well.

In fact, so influential is this group that it's had a measurable impact on social discourse. We can even attribute most internet-specific vernacular back to its members. On fleek. Amariite. Lit. Yaas. Shook. Basic. Language that's found its way not only into mainstream consumer conversations, but brand social parlance as well. In this sense, Black Twitter is not only a conversation catalyst, but a linguistic starter pistol.

Consider that fact, the next time a fashion brand calls something basic, or you're targeted by an ad describing a product or event as lit. Even when someone you follow simply captions their lunch with 'Yaas.' This adoption of language is in many ways an entirely natural process: the uptake

“[Black Twitter is] a cultural force in its own right Now, black folks on Twitter aren't just influencing the conversation online, they're creating it.”

Shani O. Hilton **VP of news, BuzzFeed US**

of language originating from influential groups by the mainstream is nothing new. But the power and speed with which it spreads across Twitter is an entirely modern phenomenon.

In the last year the impact from active social media groups has been staggering, even shifting the bottom line. So much so that Hollywood now tiptoes around these groups in the lead-up to major film releases. Greater focus is now placed on social with the aim to create buzz and anticipation in the lead-up to a release. Conversely there's fear of the power of these groups to leave a film dead in the water before most people have even seen it. It's like word-of-mouth on steroids.

But it's after entertainment moments that we see the biggest cultural impact. The Marvel movie *Black Panther* broke records not only

in theatres but online as well, boasting the greatest Twitter engagement of any movie in history. The hashtags were as numerous as they were powerful. It even sparked initiatives to support low-income families to see the movie.

If black culture has been misappropriated in the West, then Asian culture has been totally misplaced. According to a recent diversity study, Asian actors take only 3.9% of speaking roles in film, against white actors' 73.7%. As a result, *Crazy Rich Asians* – the first Hollywood movie in 25 years with an all-Asian cast – sent Asian Twitter into a spin. The film has since garnered a 100% rating on Rotten Tomatoes.

These groups don't just build things up, they tear them down, too. Cancellation culture – when incensed groups boycott something or someone with a view to stop their output – can have a drastic and meaningful impact. #MuteRKelly – a campaign to pressure radio and streaming services to boycott the R&B artist, sparked by sexual abuse claims – has grown from a grassroots campaign in Atlanta to a global social conversation.

Spotify and Apple Music have both removed his music from their curated playlists as a result. In this, much like in the wake of #MeToo, a marginalised group has facilitated conversations, started movements and had tangible effects not just in social, but in the real world as well.

TREND

7

USE IT

Make it work for your brand



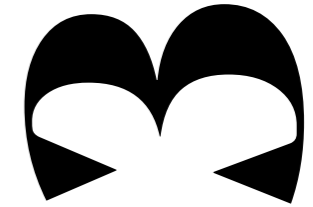
BE A TREND SPOTTER

Co-opting these groups would likely be met with derision and embarrassment for any brand. They should instead be treated as microcosms in which trends form, and places you can spot internet conversations in their absolute nascency.



APPROACH WITH SENSITIVITY

It's possible to engage with communities that interact with your brand. The degree to which you interact back depends on your own authenticity in that space. Asian Twitter's response to the Netflix show *To All the Boys I've Loved Before*, for example, is a conversation in which Netflix can be involved. But sensitivity around group vernacular is paramount.



KNOW THE RISKS

At a time of increased sensitivity around marginalisation, it's important to look to your brand values and comms to ensure there's nothing that could cause offence to these groups. The first step towards avoiding a backlash is to remove any potential triggers.

351M

The number of *Black Panther* mentions on Twitter, making it the most tweeted about movie of all time



We're in the midst of a revolution. As individuals become the gatekeepers to their own data, it's essential that brands find access on the right terms

DEM OCR ATIS ING DATA

KNOW IT

Understand the trend

Relinquishing control of data has become such an unconscious process that it's hard to imagine ever regaining it. It's been the cost paid for Facebook, Instagram and Twitter. Email and search engines, too. Since these supposedly 'free' platforms came into being, consumers have been divulging their personal information like money to the electricity meter, without ever looking at the reading.

But user behaviour – and indeed the data game itself – is changing. The recent Cambridge Analytica scandal – and in its wake the EU General Data Protection Regulation (GDPR) – ushered in greater consumer awareness. Data has gone from being something brokered in the background to a currency discussed in the open.

And it has been a polarising topic: consumers are either wilfully ignorant, scatter-gunning left clicks on the cookie 'accept' tabs in place since GDPR, or they're very much aware of its value and enraged by the lack of transparency and meaningful changes from the big data players, despite calls for just that.

Some have gone so far as to delete Facebook entirely. Over 390,000 people have discussed doing so online. The response from social media companies has been

to draw back the curtains that have been hiding data collection for so long.

“Personal data is the new oil of the internet and the new currency of the digital world.”

Meglana Kuneva *previous European Commissioner for Consumer Protection*

Many people see these recent attempts at greater transparency as tokenistic efforts. The likes of Facebook and Instagram are now allowing users to download their data to see exactly what they have on them. But the files are limited – they contain stats considered by many to be inconsequential when compared to things like cookies and location data. People want more.

That's because, in this new wave of internet self-awareness, many understand that, when properly sifted and applied, data becomes a valuable commodity. Last year, the *Economist* wrote that data has replaced oil as the world's most valuable resource. New blockchain businesses are already trying to service this fledgling trend in the form of marketplaces for people to sell

their data on to businesses. Wibson, a decentralised data marketplace, focuses on transparency and puts the seller in control of when – and indeed if – a buyer can ever see their identity. The uptake of individuals selling their own data is small but growing.

A tremor caused by the increase in data awareness was recently felt as far as Wall Street, with Facebook's customary dominance rocked hard. With the report of 2017-18 user growth coming in at way under what was expected – in no small part due to questions around the company's use of data – Facebook lost 23% of its value in less than two hours. Of course, this was a blip, and they continue to make inordinate profits. But this backlash certainly made some important people in Silicon Valley nervous. And it's only gaining momentum.

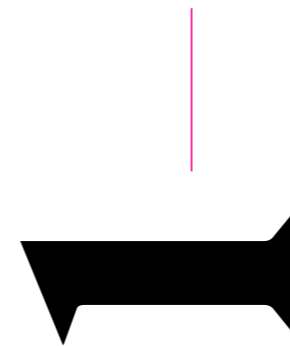
This traction poses a big question for the brands who rely on consumer info for their sales and marketing: if attitudes towards data continue to change at the current pace, and if simply being seen as a business that uses data to its own benefit is developing negative connotations, what does all that mean for the ways in which we buy, sell and utilise it in future?

TREND

8

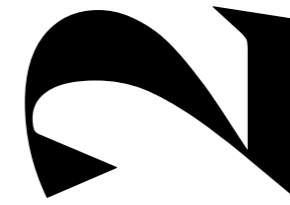
USE IT

Make it work for your brand



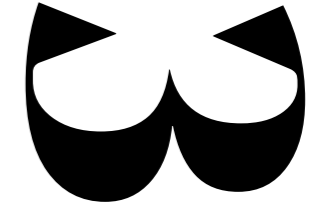
KNOW THE VALUE OF DATA

We're about to become a data economy. But not every datum is created equal. As it potentially becomes more expensive and less abundant, work out what you need and the ROI value it brings to your business. Is your priority understanding your customer's geolocation? What data do you need to communicate with your audience? Think about what you can and can't live with as a brand. Understanding the value of different levels of data will help you streamline how you use it in future.



SHOW THEM WHAT YOU'VE GOT

As this trend spreads and normalises, more and more people will expect greater transparency not only from the likes of Google and Facebook, but all brands who store and use data. The #deleteFacebook movement has shown the scale of the potential backlash. Soon, consumers may be able to request what you have on them. Make sure that's a seamless process.

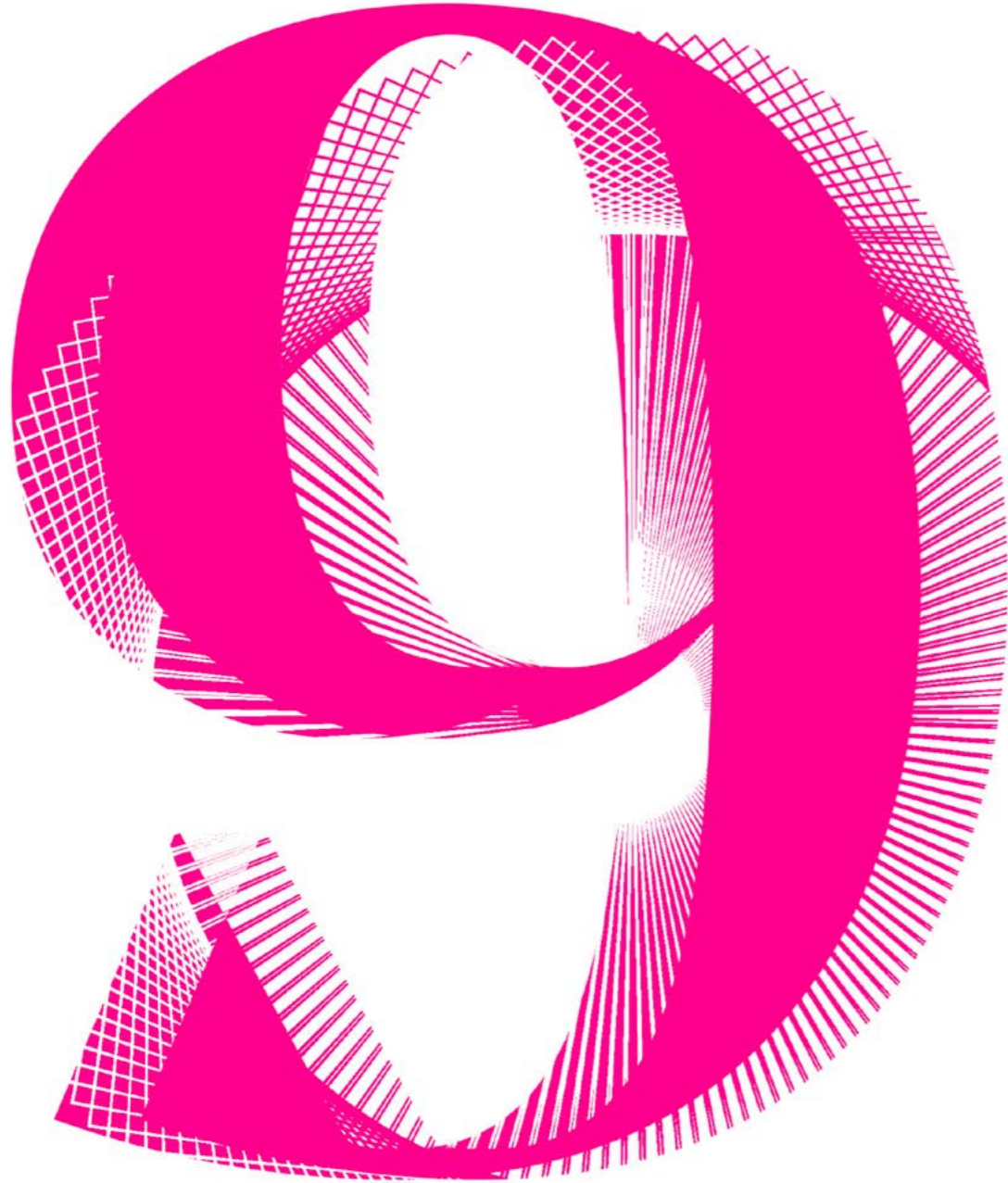


INCREASE YOUR TRANSPARENCY

If transparency is one of your core values, and you wish to be seen as a brand taking real steps towards it, then give more than stealthy privacy policy updates and the obligatory cookie accept pop-up on your website. Avoid the legalese. Instead use self-effacing humour and conversational language to outline what data you gather and how you use it. Acknowledging it with a knowing tone will help build consumer trust.

\$240

The amount per year the average US citizen could make through monetising their data - Wibson



In 2018, livestreamed video snared consumers and kept them hooked long after the content had finished. Now brands have a chance to reel them in

RIG HT NOW CRO WD

A diagonal line of magenta dots runs from the top right towards the bottom left, crossing through the text. A solid magenta line also runs diagonally from the bottom left towards the top right, crossing through the text.

TREND

9

KNOW IT

Understand the trend

Social media consumption is changing. Consumers aren't identifying with throwaway content as much as they used to. Studies show that as many as half of social natives – people who have grown up with smartphones – are seeking relief from traditional social media. Many are gradually moving away from newsfeeds towards more meaningful content.

genuinely thumb-stopping. And it appears substance – to Gen Z and millennial audiences – is found in the trepidation, the realness and the unscripted chaos of live content. Where once it was live TV that fuelled watercooler moments come Monday morning in the office, we now have live content creating watercooler moments on social as well as IRL.

is allowing for that at an unprecedented scale. When YouTube livestreamed Coachella this year, a global audience of more than 41 million people tuned in to watch, shattering YouTube streaming records. The conversations after the event were as varied as they were passionate, but mainly focused on Beyoncé's performance.

Jeremy Clarkson may be less glamorous than Beyoncé, but the Battle Cars event live-streamed to promote the new series of The Grand Tour was an explosive watercooler moment in its own right. To promote the show with users of the platform, popular Twitch personalities faced-off against each other in a game driven by live participation from viewers. On a life-sized game board rigged with explosives linked to the live chat, influencers and viewers were able to blow up '90s cars. The objective, according to the agency behind the stunt, was to capture new viewers on a global scale. The mass-participatory live event made that possible.

While people do still consume a huge variety of content, many are looking for more. More passion points they can engage with and discuss on social. More from the content producers and brands they follow. And more impact from the video they choose to watch. Not everyone is there yet. But live is where a lot of consumers are going. Relevant brands need to keep up or risk getting left behind.

While we're not seeing full-blown platform migration – people are of course still glued to Facebook and Instagram – this attention shift does raise an important question for brands wanting to connect with consumers via social: where on earth are they going?

“[Live is] one of the most genuine ways to connect with an audience and allows for levels of personalisation that the marketing industry has never seen.”

Neil Patel **Forbes top 10 marketer, 137 best selling author**

The short answer is nowhere fast. But people moving away from traditional content does appear to correlate with a growing preference for live. Facebook says that 20% of the videos on their platform now come via Facebook Live and that users spend three times longer watching this content compared to saved video.

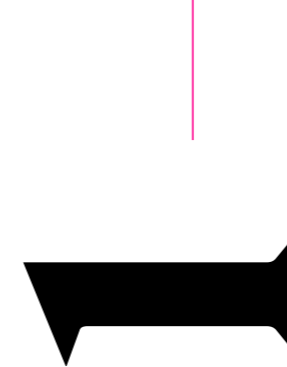
It now takes more substance to make content

live audience of over 640,000 people. But that was just the beginning. Influencers, celebrities, magazines and fans went crazy for this moment. And the subsequent conversations on social channels went on for weeks.

It shows that people are conversing around passion points more than ever, and that social

USE IT

Make it work for your brand



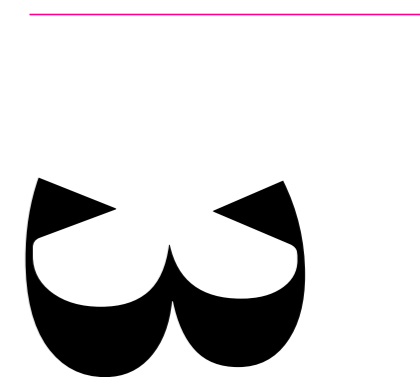
FIND MORE DEPTH

Consumers are choosing the parts of themselves they most identify with and leaning into them more strongly. Live is an opportunity for your brand to tap into those things as well. Try not to be shallow in lots of areas, but deeper in a few. If a genre of music is aligned with your brand values, for example, consider how you could be involved in a YouTube livestream event through sponsorship or an ambassador.



SURVIVE THE LIVE

Consider what's important to your brand and how you can create a groundswell around it with a live moment. It could be stunt-based like the Battle Cars event or more celebrity or influencer focused like Drake x Ninja. First and foremost have that watercooler moment in mind: what would stir up conversations on social and IRL? People need a reason to tune in.



SHRINK YOUR AUDIENCE

It's not just mass participation that makes live worthwhile. There's the opportunity to work with smaller, more niche audiences as well. Consumers have demonstrated a taste for unusual methodical processes like that livestreamed by Pearl Bro, an unlikely Chinese influencer who offers insights into the harvesting of pearls. If there's a craft to your product, there may be an audience keen to see it.

300%

How much more time people spend watching a live video compared to a pre-recorded one

ALL TRENDS AT A GLANCE



SOCIAL STANDING

KNOW IT

Leading brands have taken a hard line on hate and publicly stuck by their values

USE IT

If nothing else, have a visible hate policy on your website, and be ready to put it into practice on social



COLLECTIVE AI

KNOW IT

Brands are utilising big data and machine learning to tap into trends

USE IT

You can now use machine learning services for the most effective crowdsourced market research



MINORITY IMPACT

KNOW IT

Marginalised groups are driving social's biggest conversations and defining culture

USE IT

Never co-opt. Instead look to these groups as the trend setters in which future conversations germinate



FAKE AUTHENTICITY

KNOW IT

Synthetic influencers like Lil Miquela prove that deliberate fakeness can be positive

USE IT

Consider using a digital avatar in your marketing, but ensure you truly know the creator



NEW MASCULINITY

KNOW IT

The masculinity debate is raging. Some brands have become passive mediators

USE IT

Look to your representation of men in your comms and ensure you offer an up-to-date message



DEMOCRATISING DATA

KNOW IT

Many consumers feel duped and want to retake control of their own data

USE IT

If data is about to become a more valuable commodity, fine-tune exactly what you'll need in future



LOCAL LEGITIMACY

KNOW IT

Consumers are doubling down on their local identities in the face of globalisation

USE IT

Try platform innovations like dynamic ads to tap into local cultural narratives on a national scale



MEMES GO NICHE

KNOW IT

This branch of memes offers insights into hard-to-reach audience behaviours

USE IT

Look to brands who've entered niche meme conversations in a genuine way to ensure you're welcome



RIGHT NOW CROWD

KNOW IT

Live video has left pre-recorded behind and created IRL watercooler moments

USE IT

You can make a splash around a campaign using live, either with a stunt or by using an ambassador

GET IN TOUCH

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