



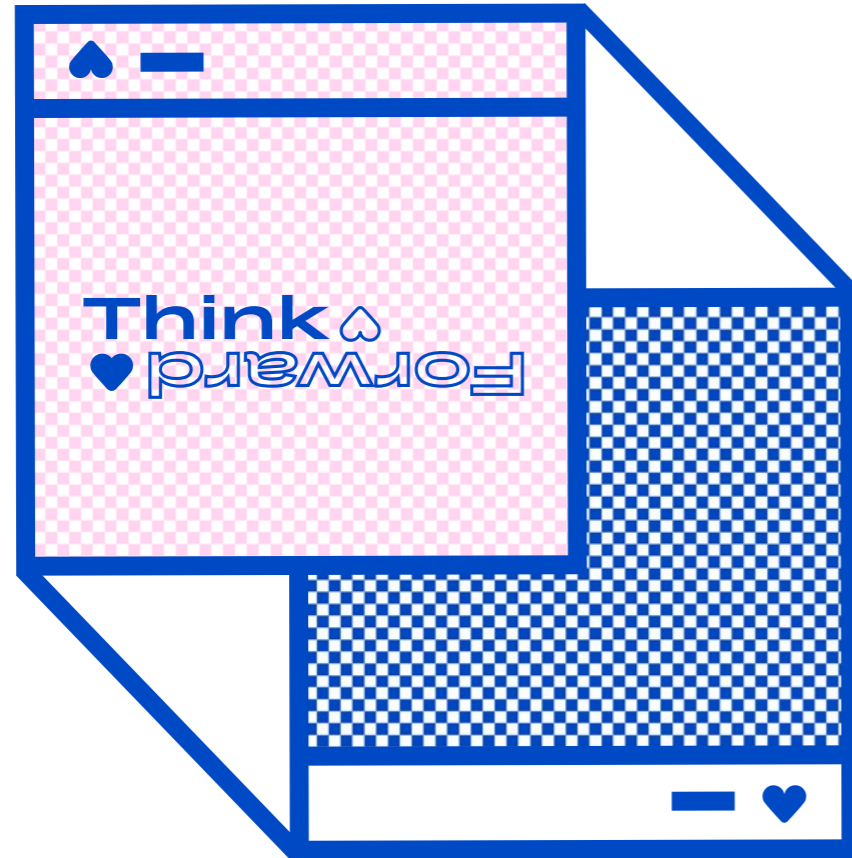
we
are
social

Think
forward

2020
2020







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The new rules of social

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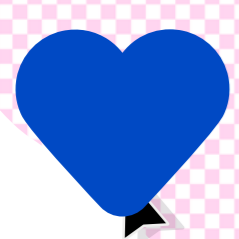
Historically, the internet has been a Wild West, exempt from the rules and restrictions of the physical world. But this culture of lawlessness – while seemingly liberating – isn't without its consequences, from misinformation spreading like wildfire to teen mental health burnout.

As a result, 2019 has seen the Wild West get a little less wild. Users, creators, platforms, authorities – all are creating new rules and laws to help mitigate some of the damage in a landscape that's been too free for its own good. Amidst this clampdown, brands have to operate within a range of new constraints – some policed by the platforms, others by communities themselves.

This is no bad thing. Studies show that creativity and innovation thrive in the face of constraints. The new rules of the internet – if used properly – can inspire brands to break out of the status quo and engage with audiences in ways that respect this cultural shift. Law, it seems, is finally coming to the wildlands of the internet. But that doesn't stop it from being the land of opportunity. It's simply time for everyone to walk the line.

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Think ♡



PREMIUM

FORWARD



Think

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Added Value

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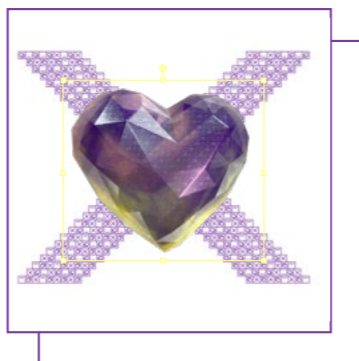
The internet has long been considered a Wild West for intellectual property rights. But in a maturing digital landscape, creators - and their content - are getting recognition.

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Social Self-Care

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Social was once a space for projecting and seeking validation. But in the wake of increased mental health awareness, people are taking a more measured approach to digital consumption.

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Bad Influence

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Influencers used to be beacons of authenticity, but being a content creator born on social media has lost its lo-fi sheen. As a result, there's a growing backlash against influencer culture and the metrics that drive it.

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Overt Privacy

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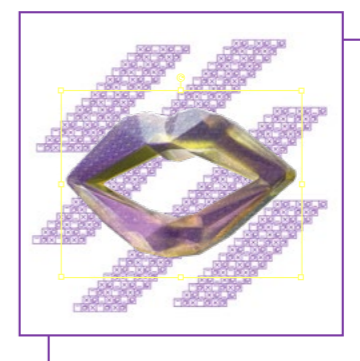
People are sick of feeling surveilled. They're taking control of their digital footprints - to hide from brands, platforms, and, increasingly, even their outer circles - and using more intimate social spaces.

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Running Commentary

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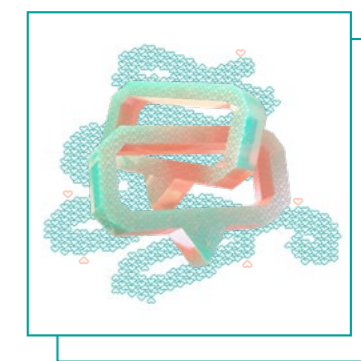
Social content is no longer all about brevity. In a maturing digital landscape, content and narratives across all platforms are growing longer and more complex.

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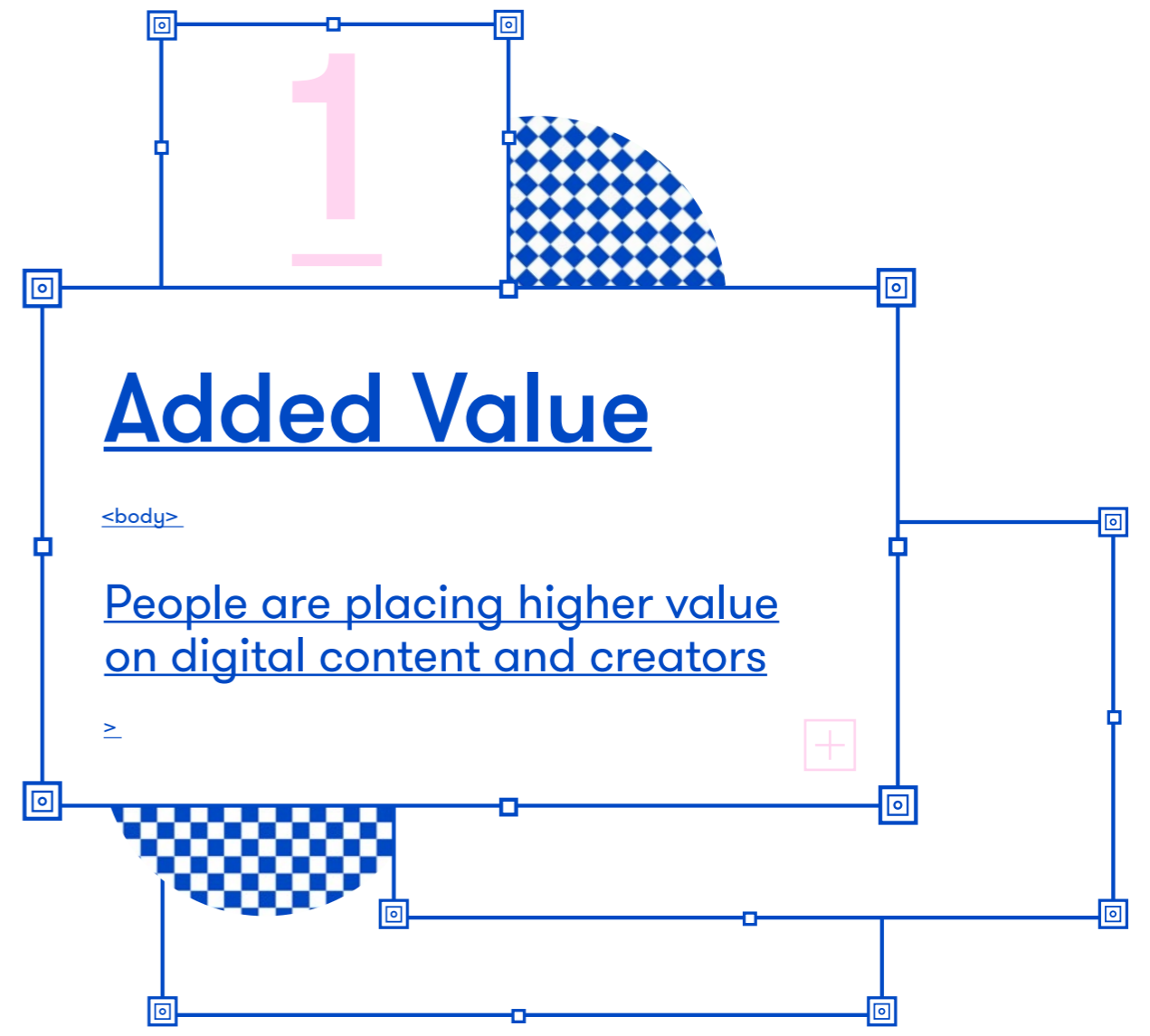
Cultural Crossfit

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People have often been forced to engage with cultural interests in isolation. People are now more open to collaborations between brands and platforms, so they're consuming culture in more fluid ways.

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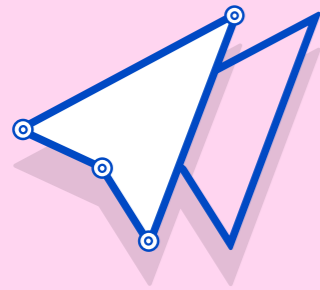


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Understand it

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The internet has long been considered a place where intellectual property is non-existent. But in a maturing digital frontier, creators have grown dedicated audiences who not only see huge value in their content, but recognise their written and visual language anywhere, particularly if it ends up on the channels of magpie brands and social plagiarists.



The backlash to perceived theft can be brutal. When T-Mobile paid a Twitter user to use their viral tweet in a Super Bowl ad, it didn't matter that it had in fact been signed off; the creator wasn't credited and their followers were furious. The audience's reaction was to assume foul play from T-Mobile, which is indicative of a more systemic problem: it still feels like the norm to steal online content without permission or payment.

Viral tweets and jokes like the T-Mobile one have real, tangible value for the audiences who want to protect their authenticity. The knock-on value for brands is obvious: this content resonates and cuts through. But you can't just badge memes like you'd badge an event. Communities are fighting for creative ownership. Brands must be seen to respect the creators.

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The behavioural change

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1 People are paying their favourite creators for content

> Patreon, a platform which helps creators build their own membership businesses, has changed the face of copyrighted content. Fans can fund content in exchange for exclusive perks, ensuring their favourite creators not only receive a revenue, but get recognised for their output. In 2018, creators generated income from more than three million active patrons on Patreon – a 50% year-on-year increase.

2 People are boycotting career plagiarists

> Jerry Media, the lucrative company profiting from sponsored posts, violated creators by removing their handles before posting memes to its own accounts. When creators tried to get credit from the joke aggregators, they were stonewalled. This led to comedians speaking out against @fuckjerry with the hashtag #fuckfuckjerry, encouraging people to unfollow the account.

3 People are calling out brands that don't credit

> Twitter user @RebeccaCNReid recently posted a screenshot of an email she received from *The Daily Mail* after she asked them to remove her images from their article. The email tells her that if she posts something on social media, "other publishers are free to publish it with[out] first seeking consent." *The Daily Mail* received a backlash for its flagrant disregard for creators' rights.

What's driving it?

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Social media has created an environment where rampant plagiarism means big money. Brands and accounts are amassing fortunes from stolen and rehashed content without paying any mind to its creator. In the age of direct connections between communities and creators, committed audiences are demanding credit and cash where they're due.

+



**Unfollow
Fuck Jerry
#fuckfuckjerry**

<pullquote>

**Patreon is set to pay out
\$1 billion to creators
in 2019.**

Patreon, 2019



Rebecca Reid ✓
@RebeccaCNReid



Hmm. Daily Mail are trying to pretend that they're allowed to use photos taken from people's social media. I think we all know that's not true...

Use it

<body>

Just because something can be monetised, or piggybacked for marketing purposes, that doesn't mean it should be. Making the wrong move and choosing profit over community may undermine not only internet culture, but the online perception of your brand.

>

Brands should champion the audience as well as the creators

By taking an audience-first approach, you can proactively show respect to the creator and the community at the same time. Beauty brand Sephora, for instance, doesn't recruit its influencers, the #SephoraSquad, based on their number of followers, but on audience loyalty. Anyone can apply as long as their followers vouch for them.

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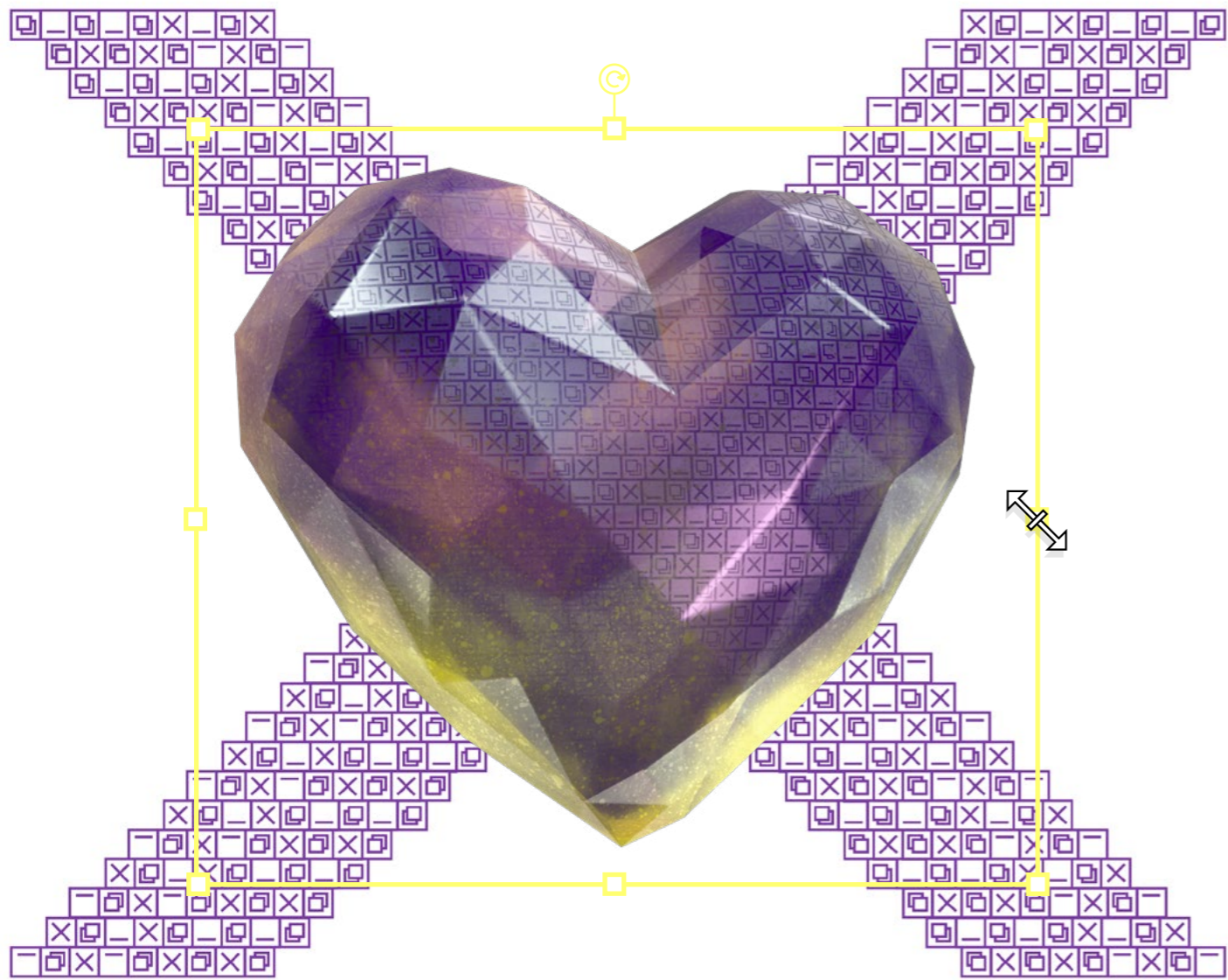
Brands should ensure they're being respectful of online communities

The North Face recently took images of people wearing its clothing at numerous landmarks and then uploaded them to the landmarks' Wikipedia pages as if they were legitimate creators in this space. They may have gamed their way to the top of Google, but their disingenuous actions outraged the Wikipedia community and then the internet at large. This cautionary tale shows the potential fallout from circumventing communities and posing as creators. The first rule of the internet: stay legit.

>

^ The #fuckfuckjerry hashtag encouraged people to unfollow career plagiarist @fuckjerry
v Journalist Rebecca Reid called out The Daily Mail after it published content from her feed





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Social Self-Care

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People are seeking a healthier relationship with their digital consumption

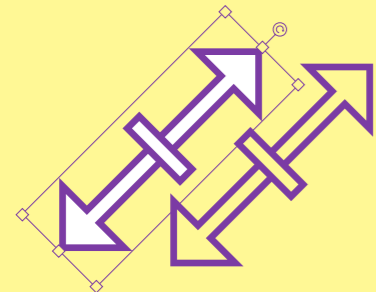
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Understand it

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The proliferation of smartphones has its ups and downs. Maps are good. Round-the-clock obligations to text back aren't. Checking your news aggregator can be informative, while the negative push notifications it prompts can wear us down. Plus the internet can be a cold, dark place. It often comes down to the survival of the snarkiest – or the most liked – with online culture often falling between that of an angry mob and a popularity contest. Having it in your hand 24/7 isn't always healthy.



But, let's face it, very few of us are actually willing to go without our trusty tech. People don't necessarily want to be cut off from the internet. They just want a better relationship with it. So consumers are actively rebalancing their digital lives to protect their wellbeing.

That's why screenshots of Apple's Screen Time are now rife in our feeds. Step trackers and running apps can step aside – showing off how little time you've spent scrolling is the new way to signal social media virtue. In response to this trend, and the greater awareness in general, Instagram is trialling the removal of public like counts – a move that's intended to mitigate the bad juju users often feel on the platform. Pinterest has similarly introduced a more compassionate search experience for people in distress. Social media, it seems, is getting a long overdue health check.



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The behavioural change

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1 People are seeking out online optimism

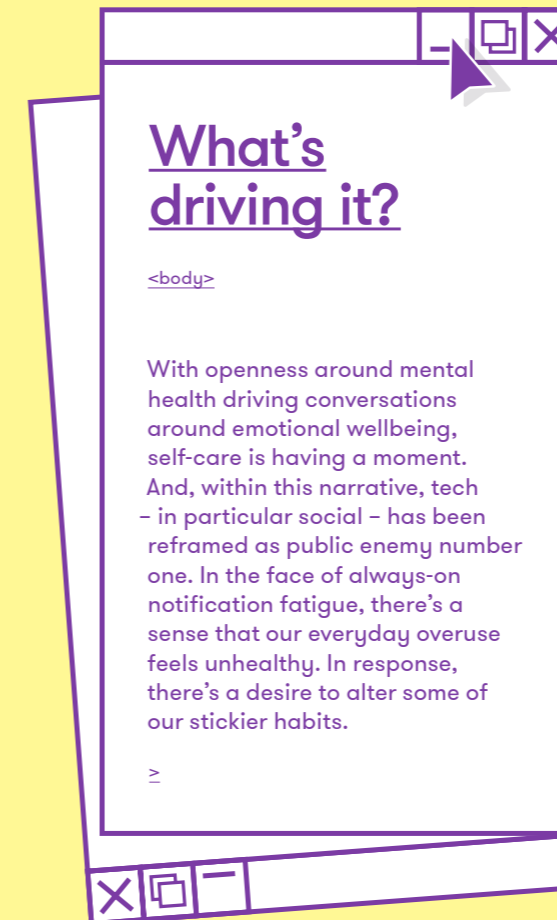
> If the prevailing feelings people get from social are ones of inadequacy and anger, then overt positivity is the new counterculture. Dancer Donté Colley has risen to fame on Instagram for his motivational messaging, which is almost corny in its optimism. Similarly, rapper Megan Thee Stallion popularised the empowering #HotGirlSummer hashtag, which she described as a celebration of “doing you, not giving a damn about what nobody got to say about it.”

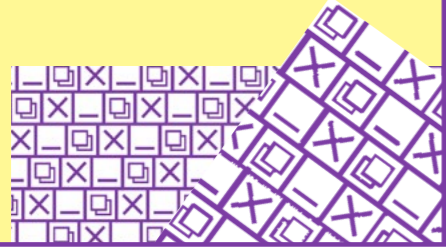
2 People are forming support networks around memes

> College meme groups, like ‘UC Berkeley Memes for Edgy Teens’ and ‘Harvard Memes for Elitist 1% Tweens’, are spaces where American college students can find solace in relatable memes around motivation, extensive privilege or other college student anxieties. It's about using humour to overcome emotional grievances specific to their experiences.

3 People are consulting with digital therapists

> Self-care ‘thread’ accounts – which post advice with titles like ‘Mental health check in’ and ‘Emotions people feel but can't explain’ – are especially popular with younger audiences, while digital therapists are also having a moment. Instagram-based @_DrSoph has a one million-strong following that can message her directly or just engage with her content to get a hit of healthy advice.

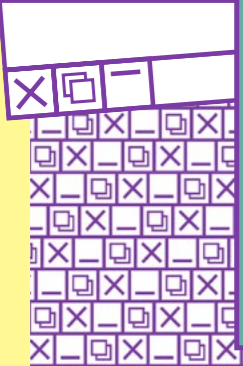




<pullquote>

Google searches for the term 'self care' have risen 100% in the past five years.

Google, 2019



Imperfect	Human
Failing	Human
Struggling	Human
Inconsistent	Human
Damaged	Human

DR SOPH



Use it

<body>

Posting positive content in spaces often dominated by the opposite doesn't feel revolutionary. But it's vital to understand that people respond best to brands with a culture rooted firmly in kindness.

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1

Brands should create content that supports people's emotional health

Uber partnered with meditation app Calm to repurpose the short journeys people take in its vehicles as moments to better their health. They created four guided meditations - all designed for different journey lengths - that enable people to use their journey to free up some mental space.

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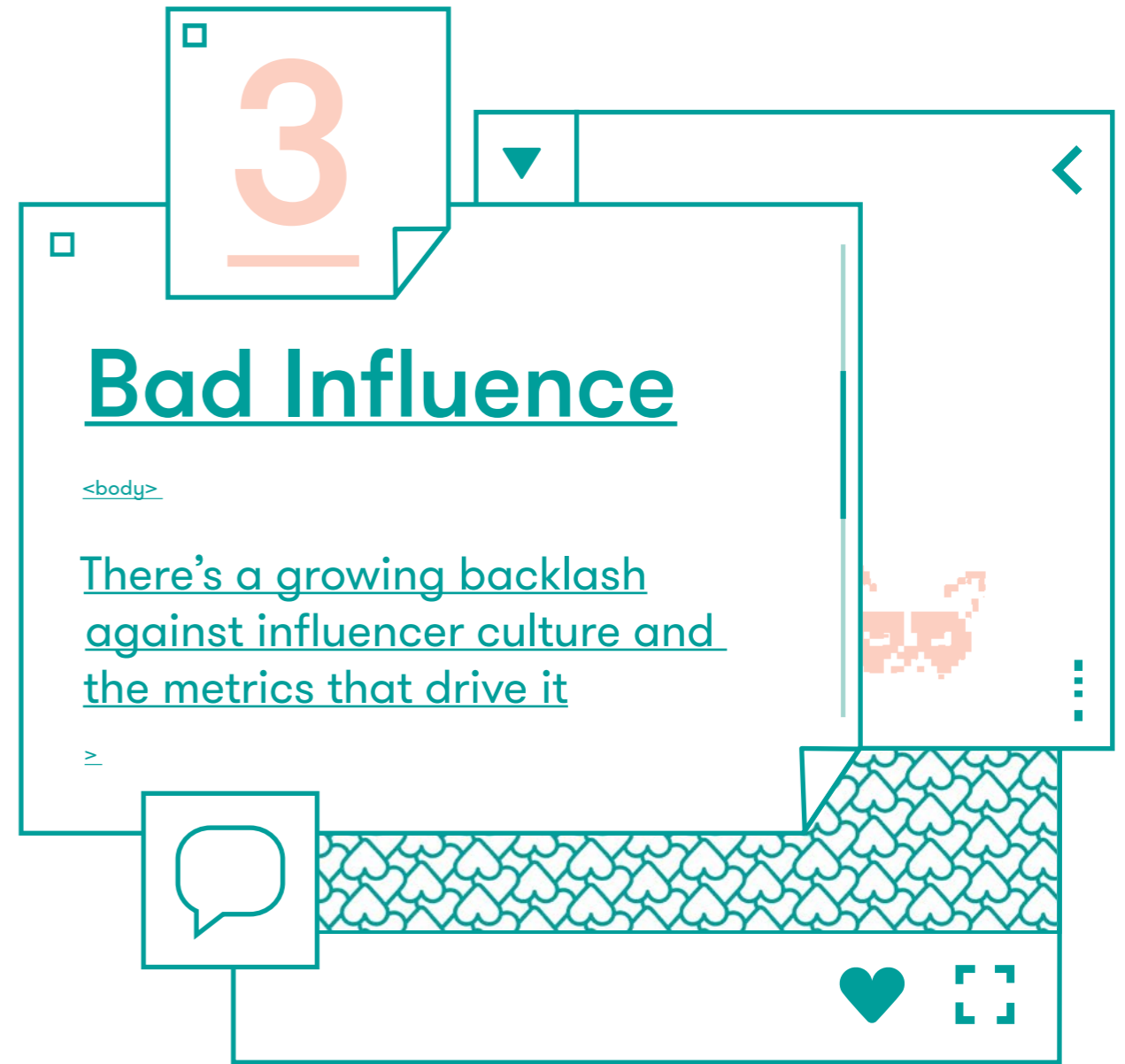
Brands should support people in enforcing healthier habits

Chinese gaming giant Tencent added age-based time limits to games like League of Legends to promote healthier usage among young people, limiting the negative impact of overusing its products early. Similarly, Vodafone created the #ScreenFreeFathersDay campaign to encourage dads to put their phones down to better connect with their kids IRL.

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^ Instagram's self-care 'thread' accounts draw followers with digestible in-platform advice
 v Digital therapists like Instagram's Dr Soph are having a moment

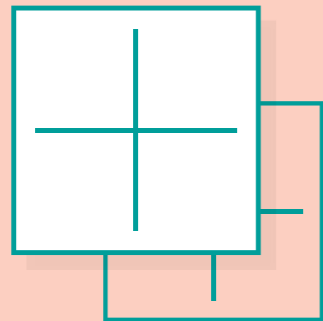


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Understand it

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Central figures of mass culture have faced criticism since time immemorial. But now, it's the turn of influencers to get the same treatment. Once protected by their ostensibly unconventional and 'authentic' rise to fame, the social-born content creator is now facing growing cynicism from an increasingly savvy consumer base.



This is, in part, because influencer culture isn't all that niche anymore. The marriage of YouTube gamer PewDiepie and Italian fashion influencer Marzia Bisognin was a media event covered by tabloids with as much fervency as Brangelina's divorce, for example. The internet has become overrun with conventional hierarchies - where success directly correlates with beauty, cash and popularity. So internet communities are fighting back.

@world_record_egg - the picture of an egg that's now the most-liked image on Instagram - is part of the shitposting phenomenon, which has gained traction in response to the vacuity of influencer marketing. With bloggers like Marissa Fuchs' offering up life milestones to the brands with the highest bids, and internet personalities like Gabbie Hanna faking trips to Coachella (also lifting the veil on the dark arts of influencer marketing), it's no wonder onlookers are growing cynical. This behaviour devalues the category. But 'good' influencers still exist. Brands just need to know who's authentic and who's not.



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The behavioural change

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1 People are refusing to participate in social hierarchies

> @world_record_egg is part of a wider uptick in 'shitposting' - a phenomenon that sees people post a huge amount of lo-fi content to a digital space. Sometimes it's with the intent of disruption. Other times, it's just for the lols. But it's always from a refusal to participate in the newly established hierarchies of digital spaces. @samepictureofcrocseveryday is one such rebellion: an Instagram account dedicated to the same picture of a Croc every day.

2 People are making fun of influencers

> A growing body of online content exists primarily to poke fun at the vacuous nature of influencer culture. Recently, a boy turned up to VidCon dressed up as an apology video, for example. And there was recently public outrage - and no shortage of parodies - after lifestyle blogger Tiffany Mitchell posted a series of glossy (and well-edited) photos of her passed out on the road after crashing her motorcycle.

3 People are engaging with celebrities as creators

> While the most influential figures on social were once grassroots creators, the lines between influencer and celebrity are blurring. Celebrities are increasingly taking on the behaviours of creators, effectively winning back engagement. Just look at Jennifer Lopez's YouTube channel or Dwayne Johnson's Instagram feed to see how established names are becoming content creators in their own right.

What's driving it?

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This year's Fyre Festival documentaries threw the real power of influencer marketing into sharp relief. There has since been a steady stream of unscrupulous influencer behaviours coming to light, permeating mainstream conversations and turning off the general public. The rise of the informed consumer coupled with increased cynicism has called into question the purpose and impact of influencer marketing.

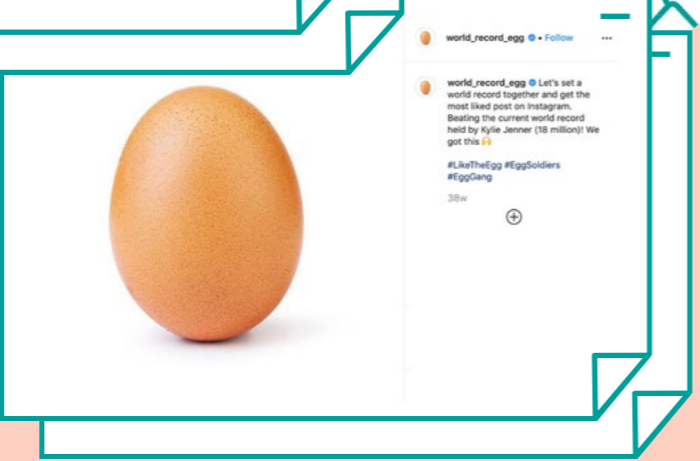
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Influencer relatability is twice as important as popularity when it comes to product endorsements.

Edelman Trust Barometer, 2019



^ YouTuber PewDiePie's high profile wedding is evidence that influencers are no longer niche
 v Shitposting accounts like @world_record_egg subvert the established hierarchies of social media

Use it

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In an era where established hierarchies of influence are crumbling, and the public is becoming more cynical and savvy about branded content, brands need to shift their understanding of influencer marketing by embracing the fact that influence exists, but not all influencers are influential.

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1

Brands should move from influencer marketing to community marketing

Focus on the strength of the bond between the influencer and their audience, rather than the message itself. Brands should validate the power of the community prior to working with any influencer and think about how the community can help them generate a specific insight, as well as where they'll hit along the customer journey. Twitter recently published research around the sub-communities within influencer fanbases and mapped them against the marketing funnel.

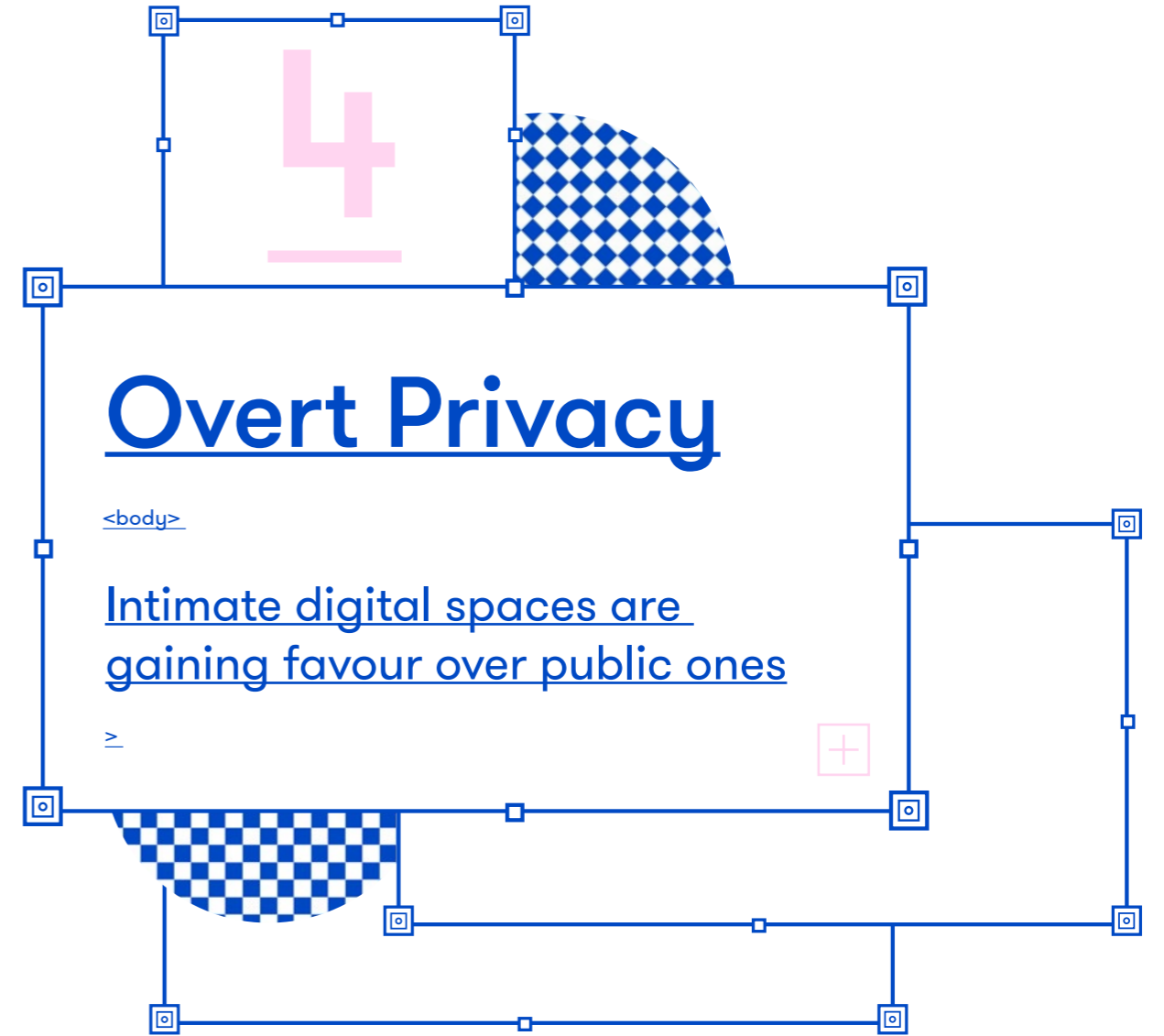
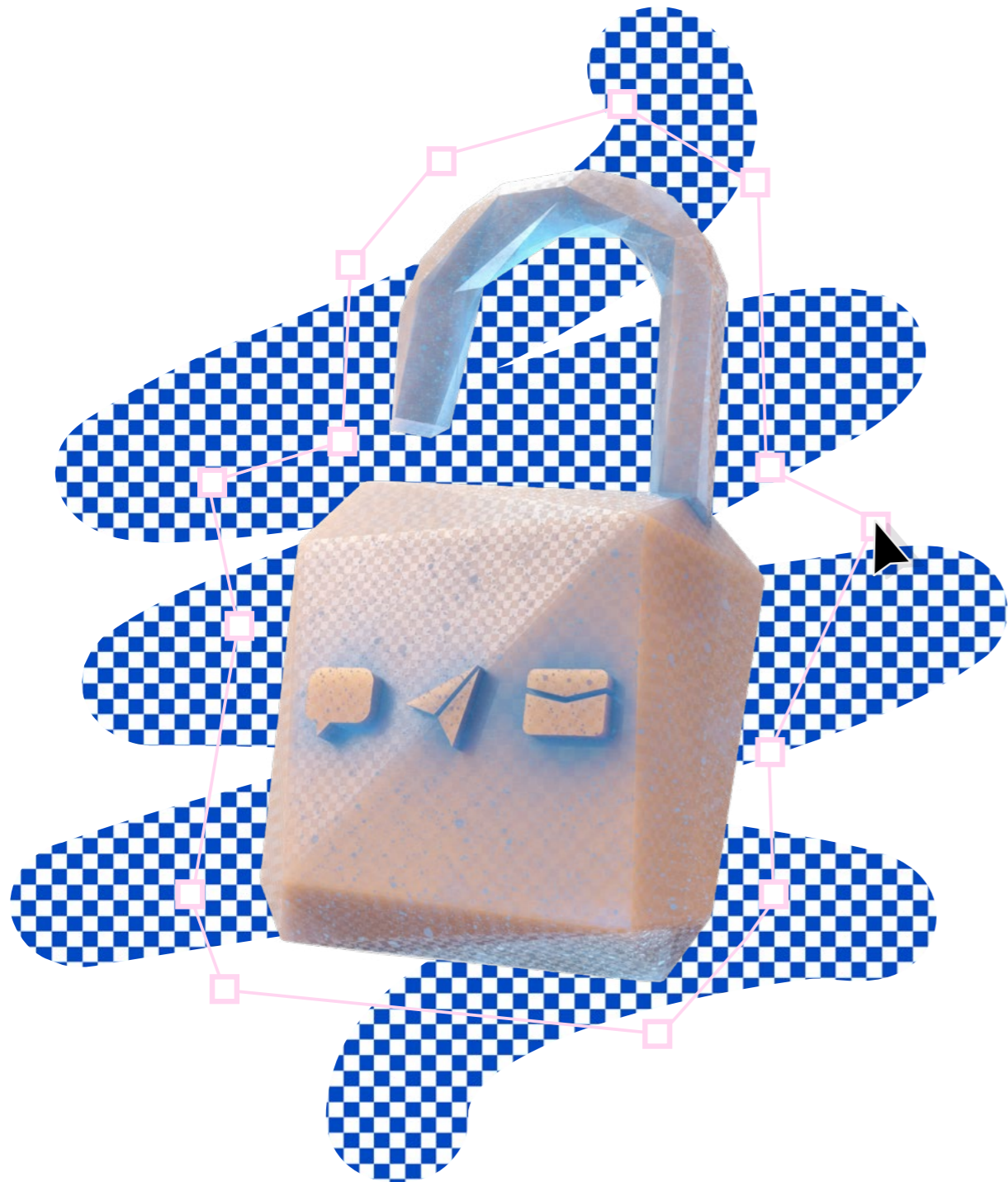
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Brands should subvert influencer tropes to generate impact

Alcohol brand Kahlúa created an IRL anti-influence exhibition of Instagram photos that got zero likes in New York, as well as developing a digital tool called #BottomNine, which let people login via Facebook to find – and repost – their nine least-liked photos on Instagram. Simply moving against accepted practice was enough to garner huge attention.

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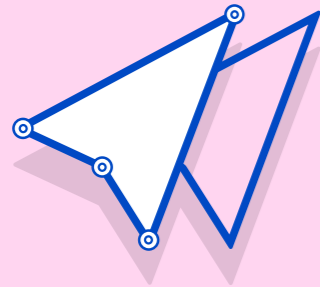


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Understand it

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“The future is private,” said Mark Zuckerberg at Facebook’s annual conference in 2019. While privacy concerns are nothing new, this has been the year when people have really started to act on those concerns, with behaviour that reflects changing attitudes towards Big Social’s omnipotence in everyone’s private lives. As a result, online habits are getting more private.



For some, it’s about retreating from social platform monopolies to more niche social networks, like Everyme or Nextdoor. For others, it’s talking with friends in encrypted spaces like Telegram (over 200 million monthly active users and 15 billion messages sent every day), where no one else can access the conversation without permission.

Not everyone is going completely dark. Others are simply ringfencing the digital spaces in which they operate. From teens deleting or archiving their entire feeds to the uptick in the use of closed Facebook Groups, this is about taking greater control of our public personas, rather than walking away from them entirely. By retreating into more private spaces, people are more liberated to be themselves and connect more naturally. This is the new social. In public, but with boundaries. Harder to track. More difficult to reach and manipulate.



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The behavioural change

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What's driving it?

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As people grow increasingly fatigued with having to perform online – and with tools like Instagram Close Friends and Facebook Groups gaining traction – the open feed feels less important than ever. This is changing tastes, interactions and what people want to see when they scroll.

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1 People are locking down their accounts

> Many people, including large meme accounts, have started to lock down their social channels, adding a layer of privacy, more control from other users slipping into the DMs. It also has the benefit of adding a layer of control over who gets to see and respond to what’s being posted.

2 People are using closed communities as safe spaces

> At a time when polarisation of opinion online means digital debates are rarely balanced, people are using closed communities to discuss controversial topics in a controlled environment. NdFlex, for example, is a closed – and heavily moderated – Facebook Group for people in France to debate the current state of the labour market.

3 People are changing their language to minimise reach and retargeting

> Whether it’s using ornate synonyms for well-known websites and products to prevent retargeting against keywords (otherwise known as ‘Voldemorting’), or referring to celebrities without tagging them to prevent wider audiences seeing a tweet, social media users are shifting their language use online to minimise the repercussions of their words.

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“The future is private”.

Mark Zuckerberg, 2019

Members - 8,067

Admins and moderators

Dylan, Charlie and 5 other members are admins. Beth, Eoin and Georgii are moderators.

^ Jadan Smith is one of many users who archive their feeds to pare back their digital persona
 v 'San Pellegrino Talk Worldwide' is a closed, audience-run Facebook Group for San Pellegrino nerds

Use it

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The rise of more discreet, intimate spaces offers an opportunity to talk to people where they're more emotionally engaged and open. Getting it right requires balance. But, if you're allowed in, you must show restraint. This is no place for the hard sell.

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1

Brands should ask for permission to play

The Telegraph has introduced a Brexit WhatsApp group for those who haven't had their fill of Brexit news. Users have to opt in and consent to receiving the less formal notifications from the newspaper. The important understanding is that the brand is entering a more private (and more emotionally charged) space.

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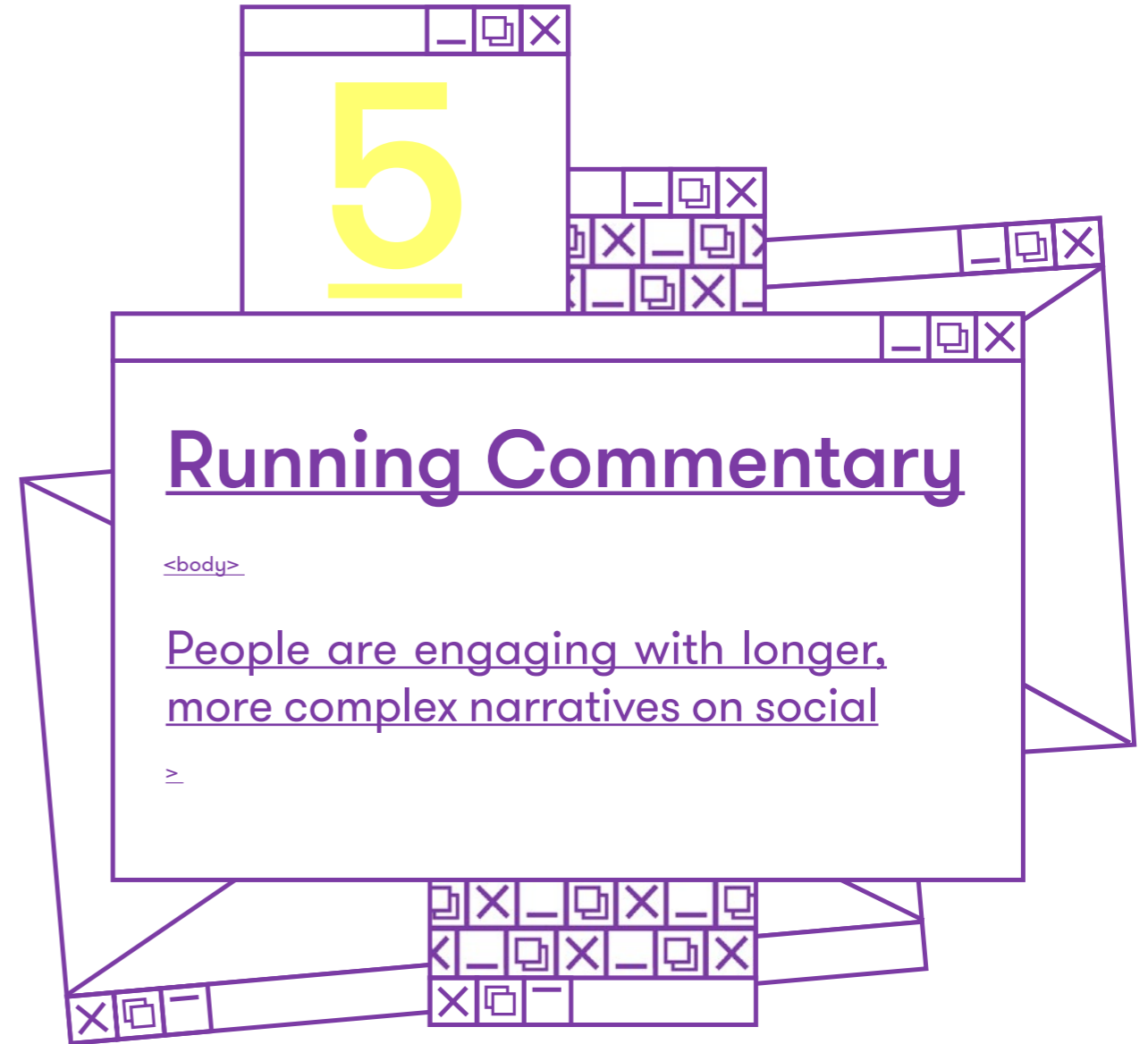
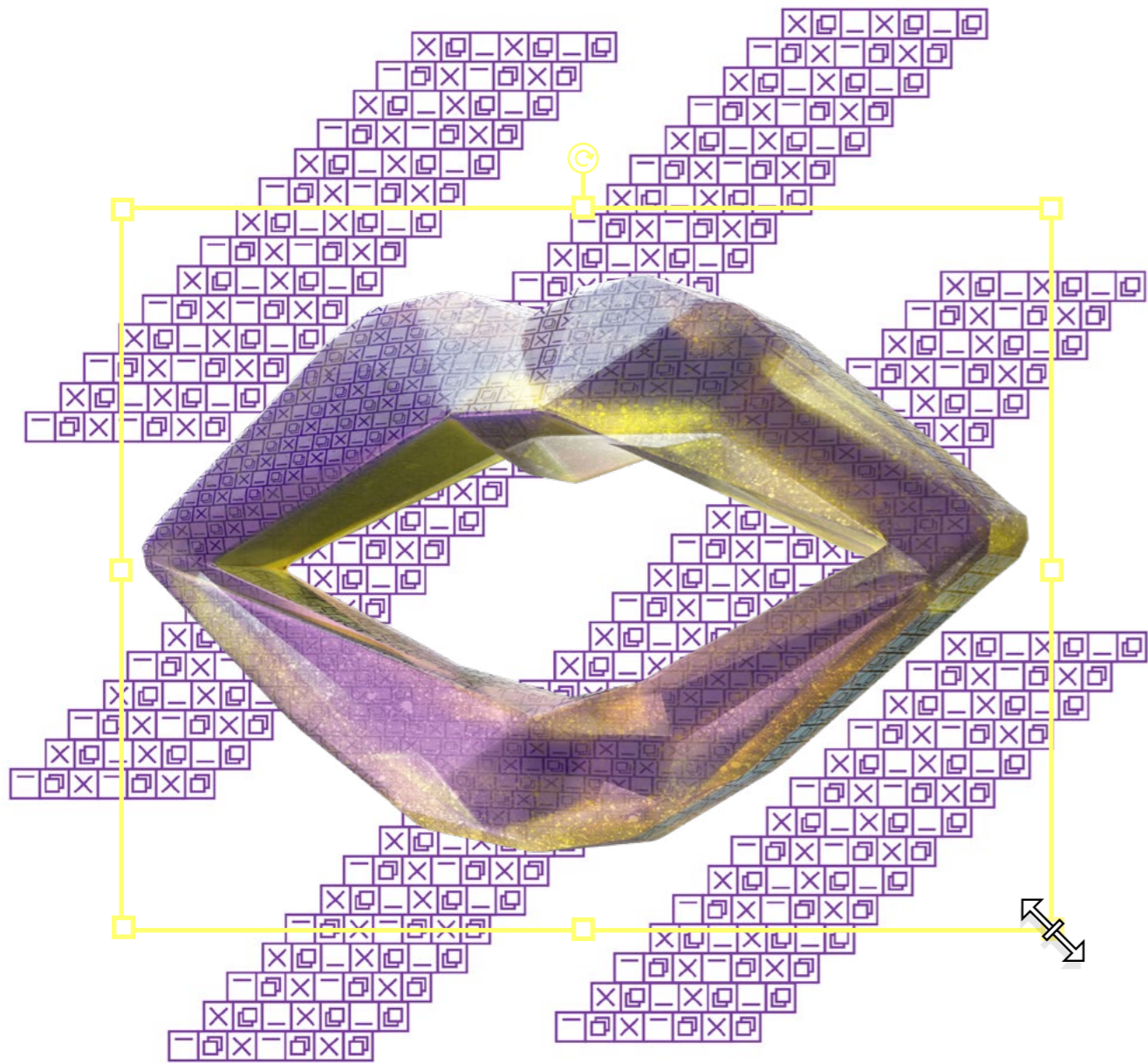
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Brands should harness the hive mind to identify trends to action immediately

Starbucks is exploring how it can use private groups and accounts on social media to better engage with consumers around product development. Parts of their audience are invited in, then made part of innovation testing. In these closed spaces, people are highly engaged and give honest, unfiltered feedback. This allows Starbucks to identify new trends and insights on a global scale and immediately jump on them.

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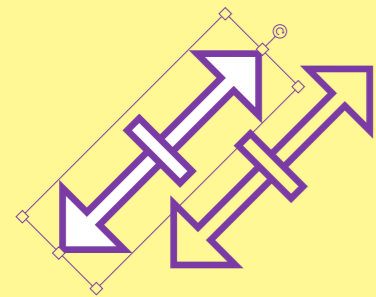


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Understand it

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It's long been accepted that people are put off by lengthy content online. Consuming lengthier prose with complex narratives requires more time – the most valuable commodity for the smartphone user – than scrolling through snappy titbits. But, across platforms, things are changing. Audiences are now willing to invest more time and attention in stories they deem to have a higher value.



Just look at the output of our favourite channels. YouTube videos are getting longer (smartphone users now spend 54% of their video-viewing time on content over 20 minutes), Instagram captions are getting wordier, and even Tweets – already twice as long as when they were conceived – are being consumed in threads. People are investing time in creating and consuming longer, more complex content.

In response, Twitter has introduced functionality that helps users follow the narratives in longer threads. Instagram and Facebook have been trialling hiding likes, which places greater importance on narrative and commentary. And while long-form music streaming platform Mixcloud has launched a subscription service in response to high demand, Spotify's acquisition of podcast providers also reflects a belief in long-form audio. This isn't the death of short-form. But it shows that people are willing to listen to those who have more to say. Platforms are adapting. Brands need to do the same.



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The behavioural change

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1 People are reading long-form Instagram captions

> On a platform that's historically been all about the aesthetics, people are adding depth and context to their posts with long-form captions. Fitness blogger @lucymountain uses them to educate readers on detailed nutrition recommendations, Lena Dunham uses them to add relatable context to her uploads, and Instagram's official handle even uses them, presumably to demonstrate its power as a micro-blogging platform.

2 People are indulging in social media soaps operas

> Early 2019 saw a feud between two YouTubers take centre stage. Beauty vlogger veteran Tati Westbrook – who famously took YouTube make-up artist James Charles under her wing – announced that Charles had betrayed her by promoting a competitor on his channel. The narrative unfolded in the form of tearful Instagram Stories, vicious comments and stone-faced YouTube explainers. It's one of a number of similar digital feuds. Think of it as the soap-opera-fication of social platforms.

3 People are interacting with Twitter threads

> Twitter was once founded on the idea that less is more. But today, some of the best moments on Twitter play out in the form of threads. We're also seeing threads get more complex. 'Being Beyoncé's assistant for the day: DONT GET FIRED THREAD' is a pick-your-own-adventure story that encourages click-throughs in every section, ultimately maximising engagement. People aren't just enjoying longer posts, but more nuanced narratives, too.

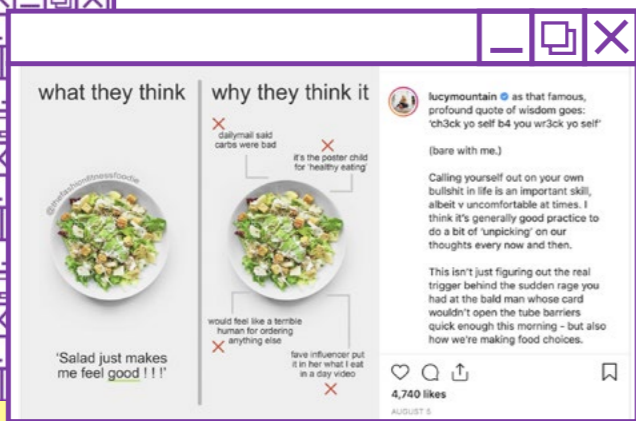




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The average length of a YouTube video among the top 250,000 channels is between 13 and 14 minutes.

Pew Research Center, 2019



Use it

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Posting a beautiful image, a relatable meme or a funny quip on social platforms is no longer the only way to get people's attention. In a saturated digital landscape, longer, more complex narratives can be more engaging – not only because they make the user read on, but because they encourage interaction and participation.

>

1

Brands should play a more active role on social

There's been a renaissance in community management, as brands feel like they have the right to be a part of wider narratives – commenting on their own and others' threads. When Lionesses launched their World Cup #BeReady campaign – announcing the squad on a Twitter thread with well-known contributors – the team showed that thinking long-form on a typically short-form platform could prove successful. The squad announcement had more longevity and encouraged far more participation than a traditional static image listing team member names.

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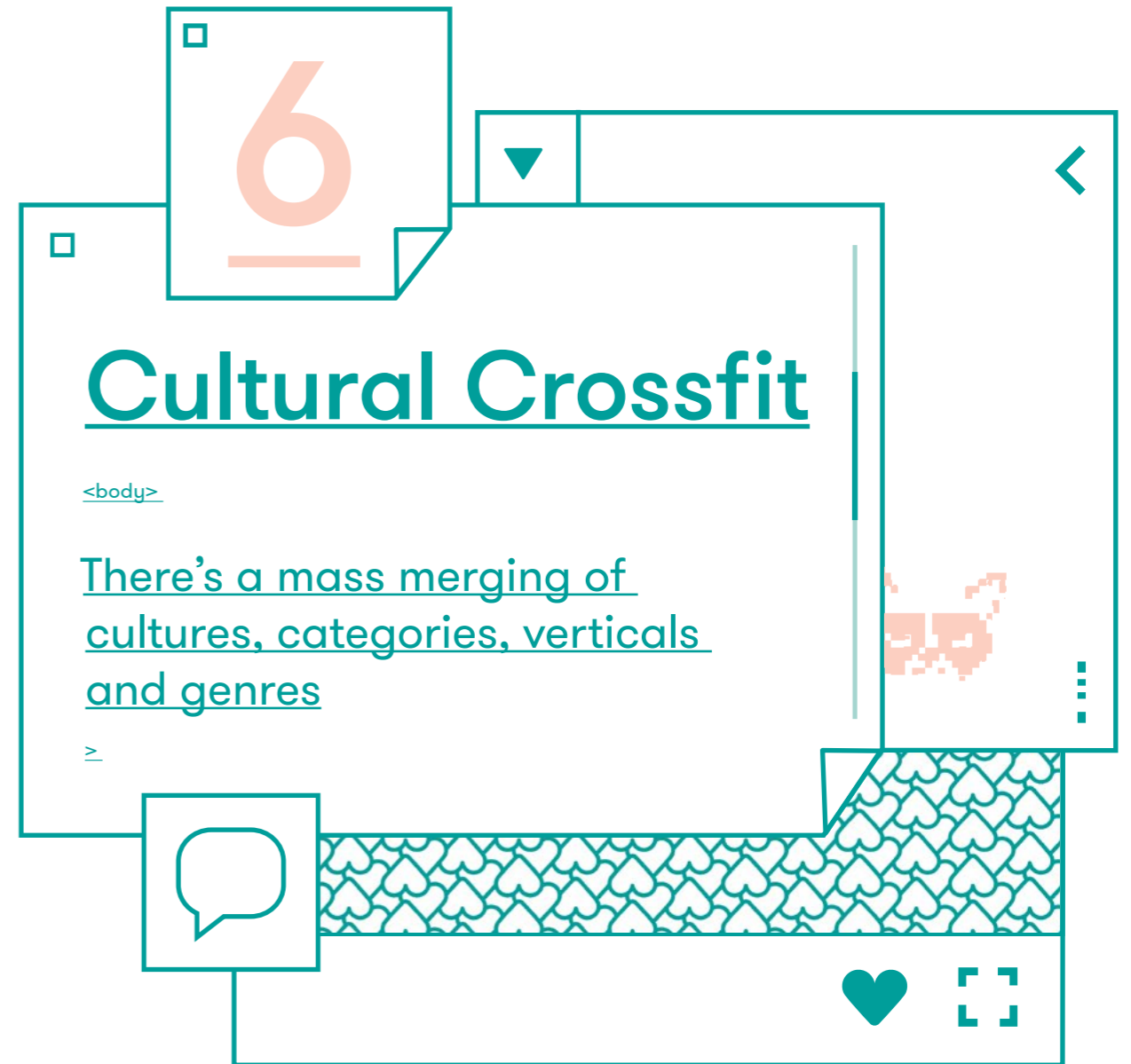
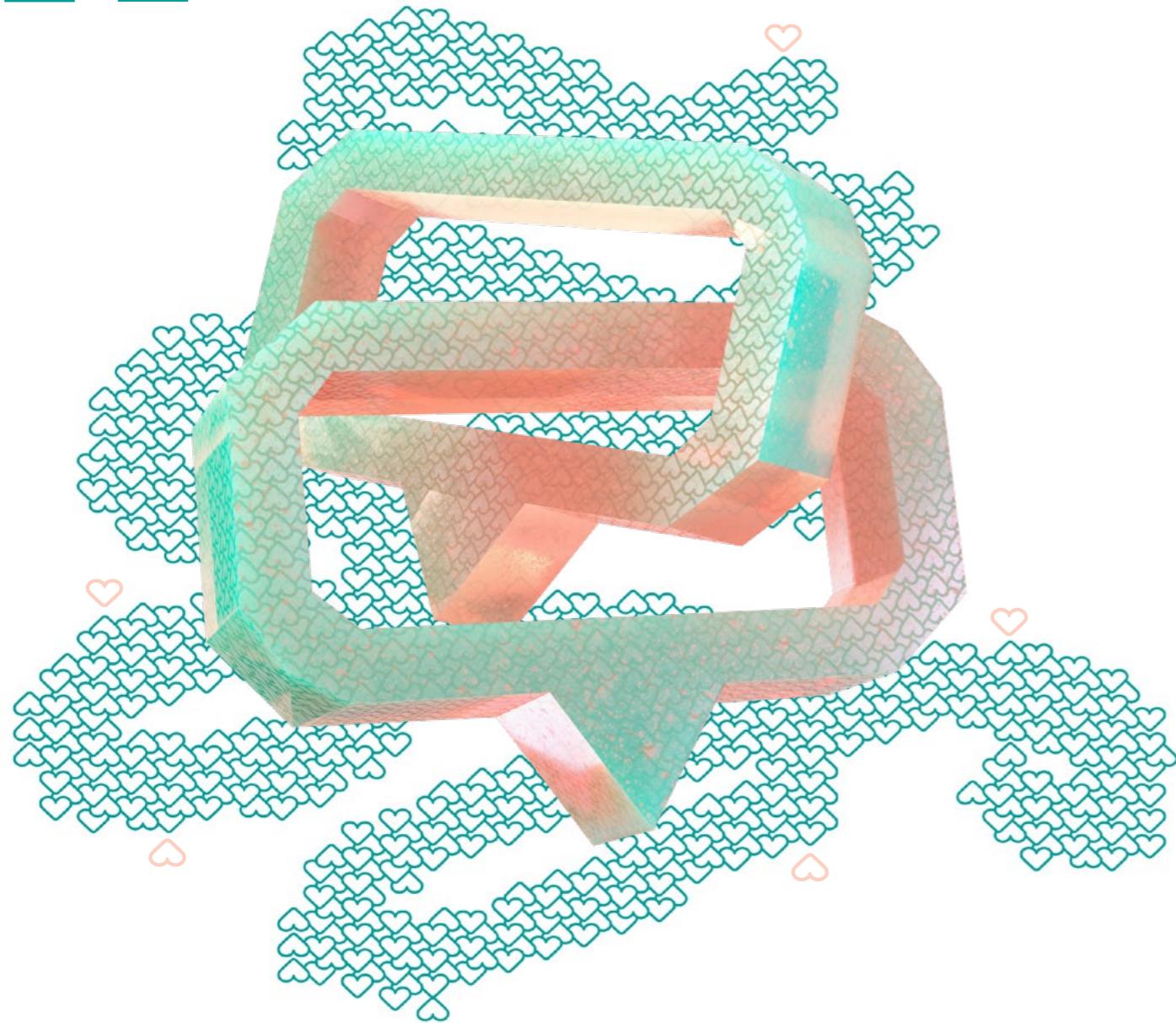
Brands should let people tell their story on social

The most interesting stories on social are the ones that are told from multiple perspectives. These maximise reach but also add nuance and intrigue, encouraging users to do a little digging to see the full picture. When Love Island contestant Anna Vakili was betrayed by her on-screen lover, for example, people could see the narrative unfold not just on the official channels of Anna and Love Island UK, but on her loyal sister's Instagram Stories, too. Similarly, HBO show Euphoria encouraged its cast to take their own photos on set, which they've gradually dispersed on their own feeds over time.

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^ This pick-your-own adventure style Twitter thread is a fresh take on in-platform storytelling
 v Nutrition blogger Lucy Mountain is known for her informative, long-form Instagram captions

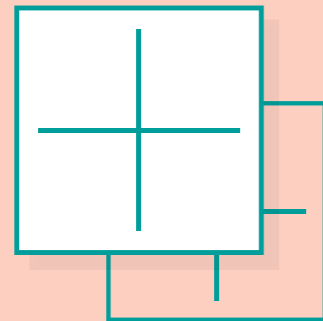


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Understand it

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The way people consume culture is fluid. People don't just love fashion or only watch TV, after all – especially not in the digital space. And they're increasingly hungry for brands to reflect the seamlessness of their cultural ecosystems. It's why Fortnite crossovers with titles like John Wick and Stranger Things have been among the most talked about moments of 2019.



This cultural convergence is more far-reaching than ever. Take teen drama Euphoria. It's executively produced by Drake – who also curated the soundtrack – and the wardrobe is a love letter to Instagram-born fashion labels. In the narrative, crossovers are also used to deepen character authenticity, by tapping into cultural obsessions; while one binge-watches Love Island, another explores her sexuality through One Direction fan fiction.

These crossovers reflect the way real people consume culture – at the speed it is created and amplified on social. Lil Nas X has similarly achieved this with 'Old Town Road' – arguably the most successful track of 2019. He uploaded it to YouTube before tweeting the link and rolling it out on TikTok in a replicable format. This multi-platform launch mimics the way people really use those platforms – not in isolation, but to complement each other; after all, the average American internet user has more than seven social media accounts.



<header>

The behavioural change

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1 People are merging cultural references to reflect their individuality

> At a time when it can feel like most ideas have already been conceived, it's at the intersection of multiple ideas, interests or genres where there's most opportunity for creative innovation and uniqueness. It's part of the appeal of Instagrammer @ripannanicolesmith, who merges high-brow and low-brow by overlaying stills from movies like Clueless and Legally Blonde with academic prose, and it's why North London rapper M.I.C says he aspires to one day be "the Kate Bush of grime".

2 People are engaging with multiple cultures at once

> Digitisation has exposed us to ideas and values from multiple cultures, and it's diversifying mass global culture. While Spanish songstress Rosalía has risen to international stardom without singing a single English lyric, French meme account @yugnat999 is driving popularity of Frenghish memes that fuse English and French as a commentary on contemporary language.

3 People are engaging with IRL interests online

> Many have grown accustomed to interacting with digital universes in ways that would usually be limited to the physical world. In August 2019, for example, Moschino launched a capsule collection with The Sims – and it can be worn in-game, too. Fortnite is arguably one of the most interesting digital spaces, due to its in-game events; when electronic DJ Marshmello held an in-game concert, it drew 10 million digital attendants.

What's driving it?

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Digitisation has driven cultural globalisation as well as the identity fluidity of upcoming generations. This was the year that K-pop got its own category at the MTV VMAs, for example, while Netflix continues to find success in foreign-language originals like Spanish-language Money Heist. Developments in tech, and a growing willingness to collaborate between brands and platforms, are also contributing to cultural crossovers functioning in increasingly nuanced and engaging ways.

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'Old Town Road' by Lil Nas X was #1 on the Billboard chart for 19 weeks.

Billboard, 2019

Mr Hotel Sings
@ronin_rmdm

Love Island on Euphoria is next level meta plot twist

♥ 3 6:00 PM - Sep 16, 2019

(Video player showing Lil Nas X - Old Town Road (feat. Billy Ray Cyrus) [Remix])

^ 'Old Town Road' by Lil Nas X is a cross-genre track launched across multiple platforms
 v In HBO show Euphoria, crossovers deepen characters by tapping into their cultural obsessions

Use it

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People's cultural diets are broader than ever, and failing to evolve with them means losing cultural clout. To tap into this behaviour, brands need to not only reflect this, but push the boundaries of what it means. Participating in unexpected partnerships in unexpected places is the way to win, especially with the digital natives who are driving this shift.

1

Brands should be adaptive and culture-first

Traditional marketers used to think in silos, whether in category – music, sports, films, video games – or distribution method – social platforms, OOH, digital. For the consumers of today, channels have simultaneously broadened and blurred, while entertainment categories have merged through culture and technology. Brands need to be more agile, on the pulse and fit enough to cross multiple cultures effortlessly.

2

Brands should target specific communities to maximise cultural impact

Brands with broad and diverse audiences can tap into niche communities – who are united by multiple cultural identity markers – to target pockets of their audience more effectively. Netflix knows that the majority of its users like TV and movies, for example, but that's a pretty broad audience. Its @prism Instagram handle – which champions the people involved in its LGBTQ+ content – is more relevant to those that follow it, because it taps into multiple cultural identity markers.





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