

SOCIAL MEDIA TRENDS 2024

A culture-first reset
for brands on social.

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01 FOREWORD

NOTHING IS CERTAIN



2024 marks the 30th anniversary of Italy's Roberto Baggio missing a penalty winner against Brazil in the 1994 World Cup finals. During the event's opening ceremony, the American organizers made Diana Ross take a spot kick, which she ominously missed. That moment in time was a well-documented cluster bomb in culture, exploding across traditional media. Imagine social and memes were available at scale back then.

Fast-forward to today. Culture is less top-down. Social has enabled a more bottom-up, bubble-up, decentralized way for culture to emerge. And the energy, velocity and amplification power of social is reshaping our world, enabling subcultures and shifting power to consumers and communities.

This is a new context where there is not one easy-to-understand mainstream popular culture. To win attention and connect in this new environment, brands need to understand nuances and show empathy like never before. Brands must not only react to culture but also embrace it, and sometimes lead it. In 2024, social media success hinges on this cultural integration.

And what a time to be alive for social platforms to navigate users in a world that's on fire. Half of the planet is looking at crucial elections that will have defining implications for democracy, for ongoing climate concerns, for the direction of geo-political conflicts and and for people craving for more individuality. All of this while platforms struggle with attention-scarcity, differentiation needs, AI disruption and advertising under pressure. But hey, it's the new normal. Big social is having sort of a midlife crisis. Just think about Facebook turning 20 this year.

For this report we've assessed the most significant developments in social media marketing in 2023 and then looked into the future through a lens of culture, all the while knowing that nothing is certain about 2024 except that there will be considerable uncertainty.

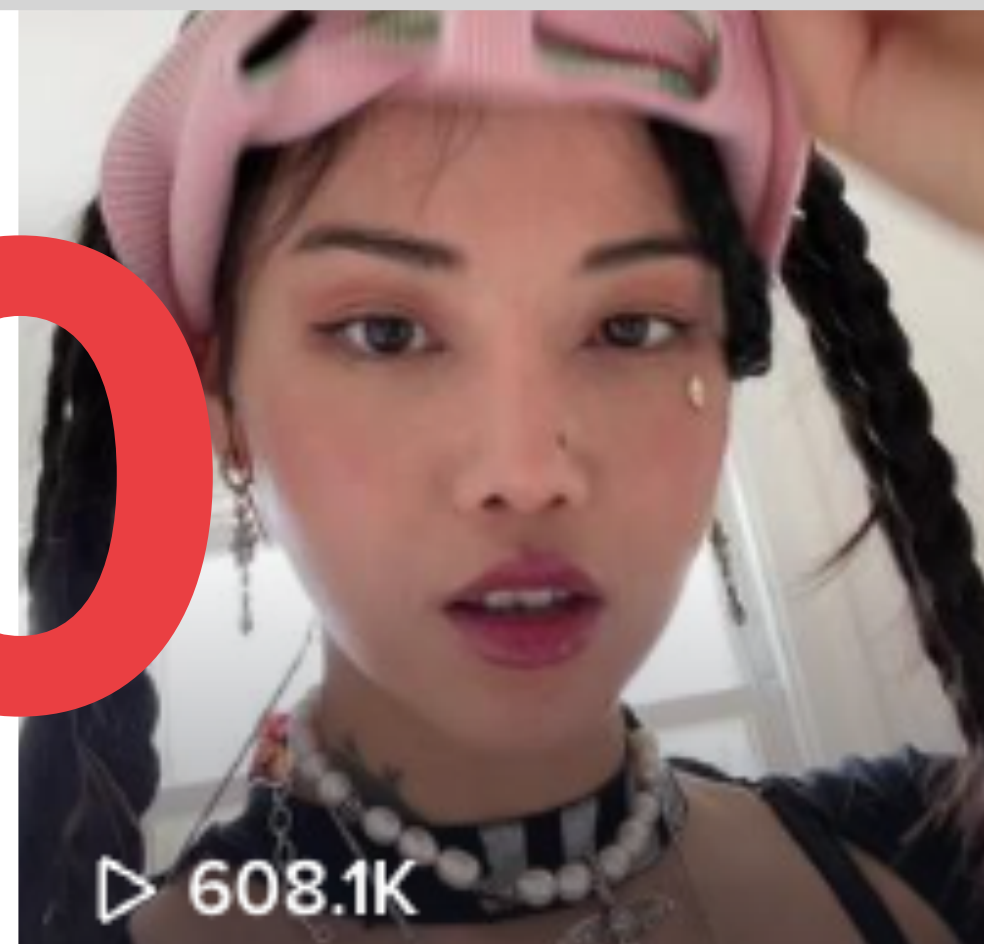
We identified 10 sub-trends that sit in this bigger shift towards a culture-first social. We tapped the minds of our talent across different departments, offices, and regions. In addition to that, we delved into campaign data and had a (virtual) coffee with some of our clients' marketing and social leads to get a better understanding of what's moving and shaking within their industries and eventually within the bigger picture of social media tomorrow.

Enjoy the reading.

02 SOCIAL 3.0



3.0



What worked for social media's previous era, no longer applies today.

Recent years have brought significant changes to social media dynamics, spanning platform environments, content codes and user behaviour. Several factors are driving these shifts. We call it the evolution from social 2.0 to social 3.0.

Social 2.0, defined by Meta's heyday of curated product-centric content, was built for paid distribution and helped advertisers achieve reach at scale. For big brands, this was largely operationalised through rigorous planning months in advance, with siloed teams working on content, community, creator and media directives.

In the current state of social 3.0, the pendulum has swung back to content built to entertain and inform, with algorithms once again rewarding organic traction. It's defined by fragmentation of internet culture and community, where anyone and anything has a niche (or several) to call home. It's also a web of complexity and contradiction:

- Authentic, lo-fi and real vs. surreal, otherworldly and fantastical mixed realities
- Polarisation on main vs. deeper, more intimate cosy web connections
- The transition away from traditional influence vs. the unstoppable rise of creators

Big brands who have been slow to adapt to this new environment are now starting to feel the pressure from social-first challengers who have built new brands almost purely through digital native propositions. To compete, brands must now deliver a more dynamic, relevant and meaningful value exchange.

Tapping into culture as it relates to customers is key to getting this right, with audience-centric content. Wasn't 2023's Barbie mania a live-action masterclass in the power of content with culture at its heart?

03 TRENDS

THE 10 TRENDS AT A GLANCE

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CULTURE AS A MULTI-LAYER GAME





‘Culture’ is undoubtedly one of social’s trending buzzwords for 2024. But what does it even mean in a landscape so saturated, fragmented and chaotic?

One starting point is the online culture and conversation that exists around a brand or product. There’s been a notable resurgence in brands responding to nano moments of traction – but some are getting smarter in how they go about it.

2023 closed out with some strong examples. IKEA poked fun at luxury fashion by offering up an affordable dupe for Balenciaga’s Towel Skirt. Meanwhile The North Face pulled off a real time delivery of a new jacket to a disgruntled customer at the peak of a stormy mountain, after her rain-soaked rant went viral on TikTok. These are brands working at the speed of online culture.

But nano moments only scratch the surface of the cultural opportunity for brands on social. Thanks to richer AI-powered social intelligence, culture happenings can be tracked and mapped as pulses, signals and shifts, enabling brands to activate in culture at nano, micro and macro levels.

And so the real opportunity in 2024 is to build relevance in much more sophisticated and enduring ways. Successful brands will be those which get clear on the role they have to play in the culture landscape, and the engagement levers needed to activate accordingly.

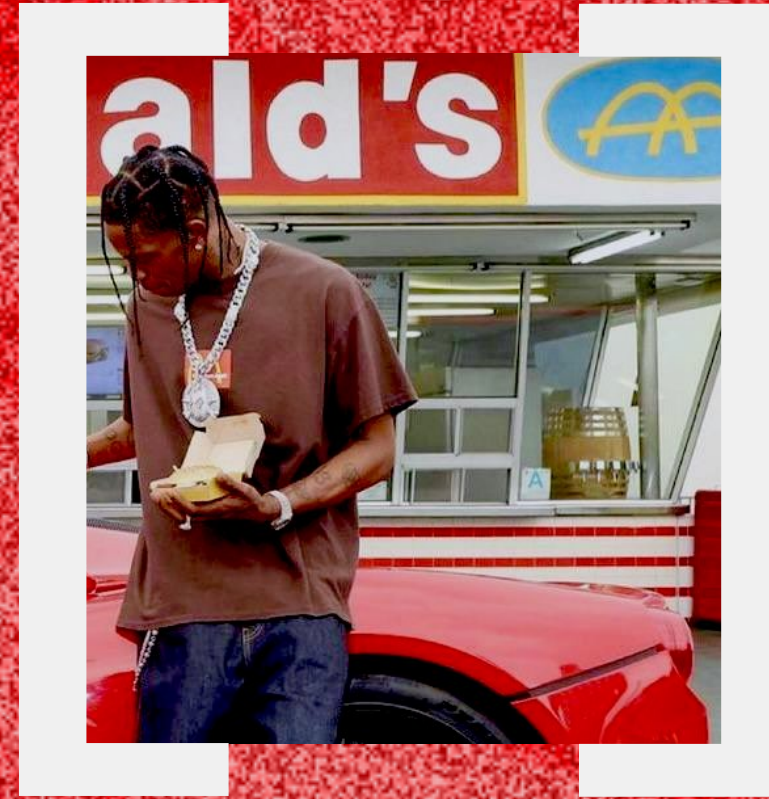
Being responsive to culture, as well as gradually shaping and creating that culture, requires understanding and monitoring of what’s happening across all corners of the internet, as well as geo-locations. The more bespoke the intelligence model, the more impactful a brand’s output can be.



[OREO x PFLAG partnership]

[Qaiser Bachani, Consumer Experience Lead, Mondelez International]

“It’s one thing to be tactical and react to calendar moments. But, the real value is to have culture being a part of the brand’s DNA and ongoing strategy. This way the work will come out more organically and the acceptance of the consumer will be much more open.”



COLLAB CULTURE HEATS UP





[Heinz X Absolut Tomato Vodka Pasta Sauce]

[Rashi Lakhotia, Senior Manager Brand Creative, Absolut Global]

“Successful work that resonates in culture, comes from the ability to give creative freedom to artists and culture-makers we partner with. Freedom of expression is a core value of Absolut, so we equip them with our distinctive brand assets – our logos, font, Absolut blue, the bottle silhouette and advertising style – and we invite them to create something original and unique.”

Mattel's cultural watershed moment demonstrated how powerful crossover marketing can be.

A plethora of brand partnerships helped take the phenomenon from Barbie the movie, to Barbiecore the movement.

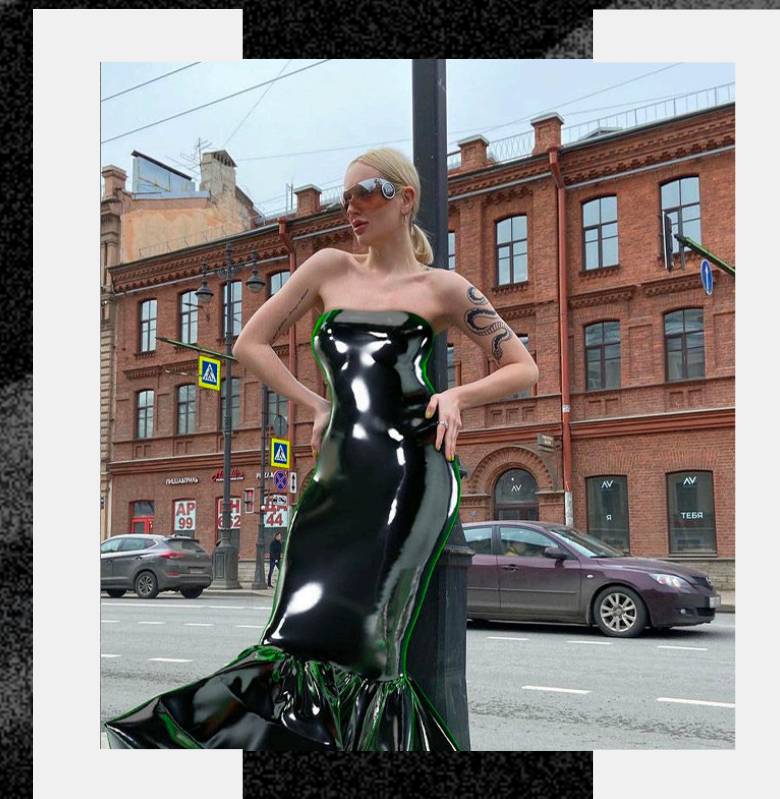
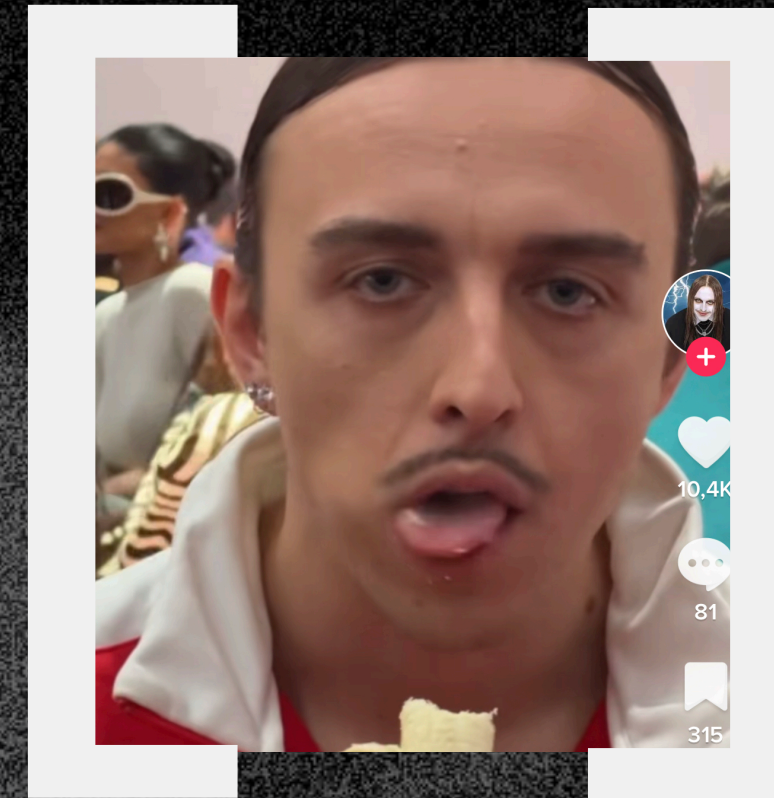
The Heinz x Absolut Tomato Vodka Pasta Sauce was another delightfully unlikely mash-up in 2023. While Dove and Nike teamed up for a more purposeful initiative.

Brands in 2024 will increasingly seek unusual alliances – the more original, counter-intuitive or bizarre, the better for disruptive engagement.

Special or limited edition drops centred on creator personalities – think Tinx x Tobasco Jalapeno dressing or Emma Chamberlain x Warby Parker eyewear collection – will also flourish.



CREATORS STAY CENTRE STAGE



3.5x

Spending on sponsored partnerships rose 3.5x faster in 2023 than social ad spending

With the creator economy estimated to hit \$480 billion by 2027, a meaningful creator engagement plan is even more fundamental to a future-fit social strategy.

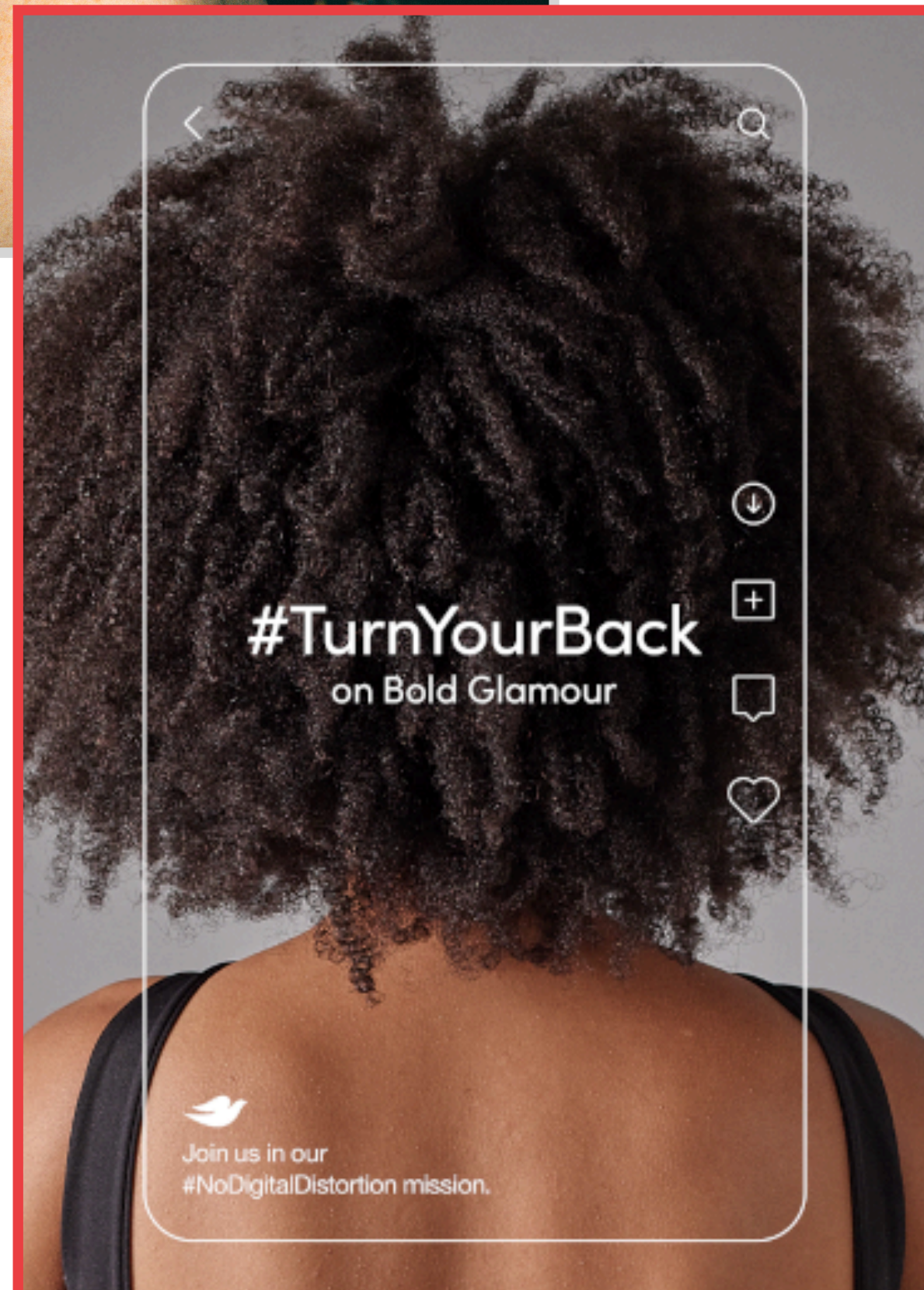
For brands and agencies, creators are a more agile and scalable way to play at the forefront of culture, free from unwieldy processes that plague more traditional modes of content delivery. As creator-led content becomes more integrated, we see its impact spreading across categories (including more unlikely suspects like B2B, healthcare and financial services).

Creator commerce will be an ongoing area of innovation in 2024, and its ability to move the needle on sales should not be under-estimated. The impact of #BookTok, #HealthTok, #CleanTok and #BeautyTok on their respective industries says it all, with brands in these arenas designing specific products to woo the creator class and their loyal followers.

2024 will see creator partnerships continue to evolve, from obvious product placement and staged enthusiasm to more ambitious co-creation between creator and brand, where product is seamlessly integrated. We predict more brands organising better to take full advantage of the creator opportunity. This could look like hybrid creator-creative teams, in-house creator consultancy, or always-on contracting as opposed to ad hoc campaign projects.

Given creators' proximity to audience, companies who assign main character roles to these personas creatively will win big. A stand-out example is Dove's multi-silverware winning Turn Your Back on Glamour campaign.

[SOURCE: EMARKETER]

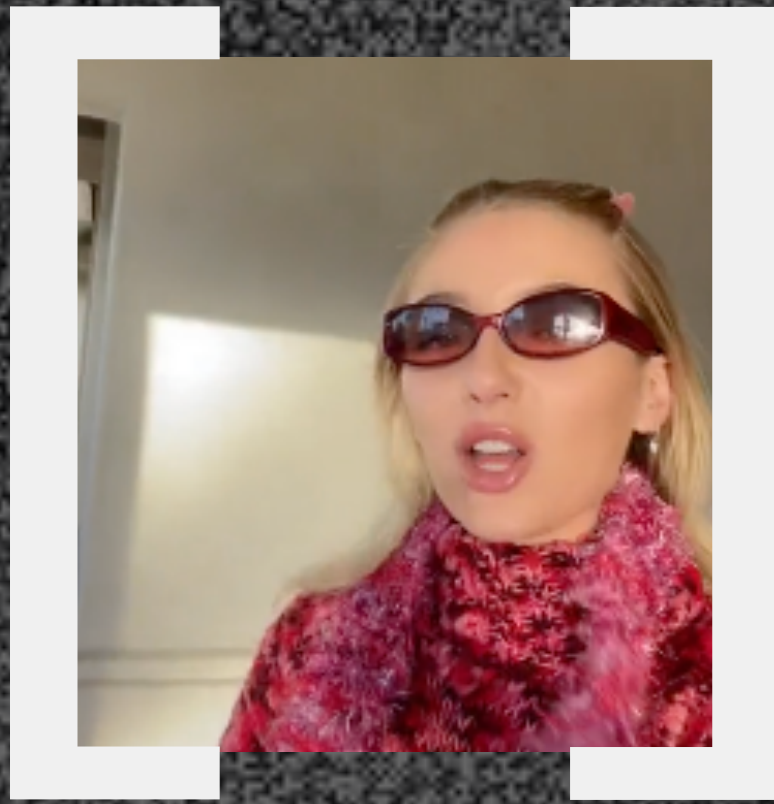




[XProject, Roche]

[Matt Viles, Head of Digital Communications, Roche]

“We’re playing catch-up in this space, especially compared to other categories. But, when you scroll through TikTok and Instagram, you see such good storytelling related to healthcare, resonating with the audiences we can’t reach traditionally. This is why we’re gradually shifting more of our advertising to creators.”



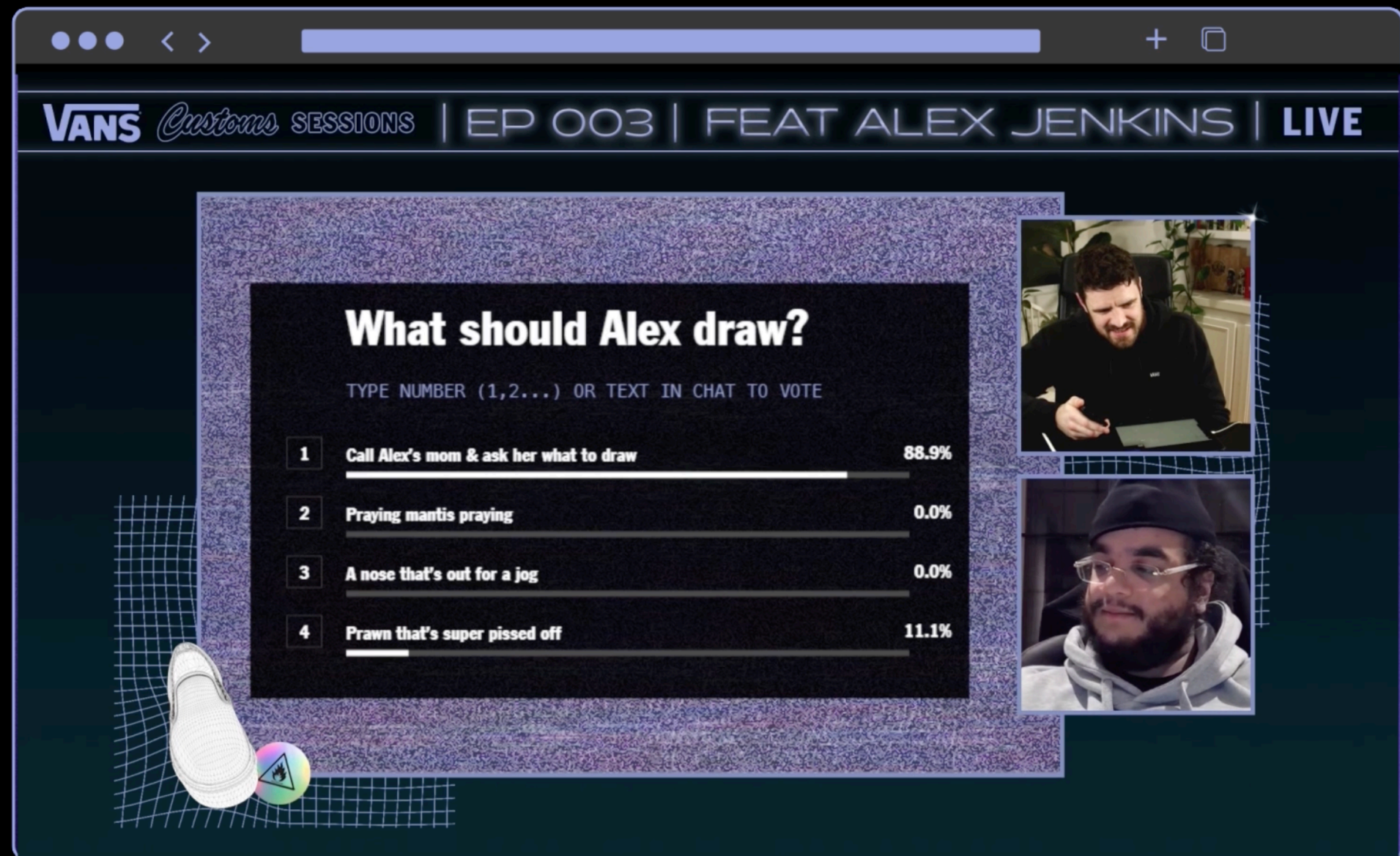
COMMUNITY COMEBACK



[Peter Jongert,
Marcom Manager, IKEA]

“Community management is becoming more important and powerful. We aspire to have a dedicated FTE to support on the community management front, so we can do bigger things with it. It’s clear to us how much customers need and appreciate meaningful interaction.”

[Vans, Customs Sessions]



Basic community management is no longer sufficient, and must evolve into a proactive community engagement strategy.

Fake news, polarization, and overstimulation have led Gen Z and Millennials to tire of traditional social. Users increasingly seek safer, quieter spaces like closed forums such as WhatsApp, private Facebook groups, Reddit, Discord, and Mastodon.

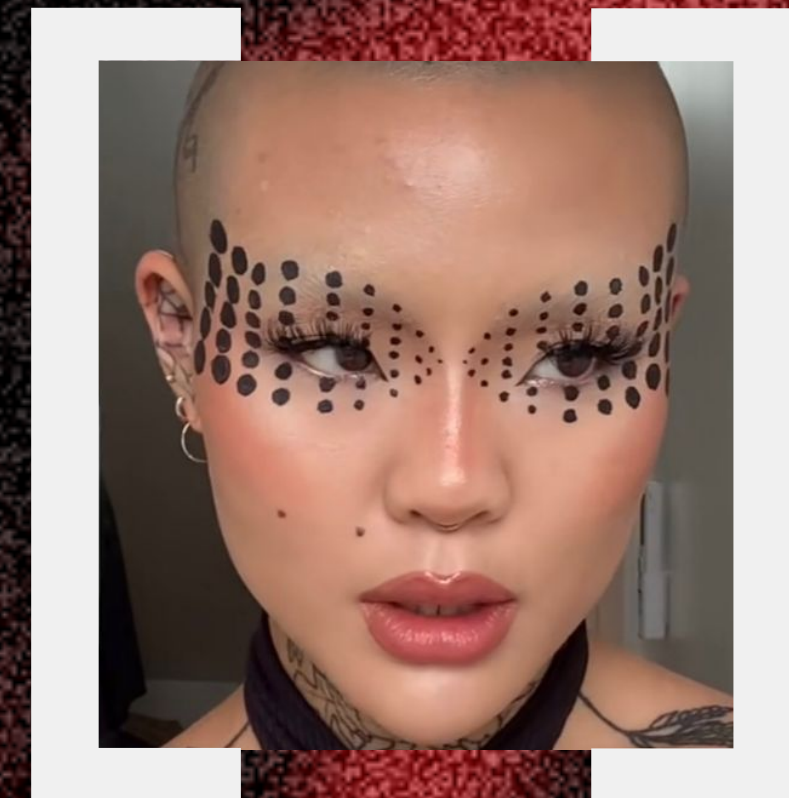
Rather than settling for a one-size-fits-all juggernaut app, they’re opting for combinations of platforms to meet specific needs, participating in online communities based on shared passion or fandom, or connecting in niche platforms.

Brands now need a considered community engagement plan, either nurturing their own communities of customers and fans, or strategically connecting with external communities through meaningful value exchange. This demands larger expert teams and more bandwidth for listening, engaging and rewarding. The outputs here are exciting: real-time customer feedback on specific prompts, brand fans inputting on new product development and testing, and content starring community members.

2024 will see more brands exploring innovative new ways to level up the social community experience. One to watch in this space is [TYB](#), a platform that offers tangible rewards for engagement and empowers brands with owned hard-working community channels.



BEFORE ANYTHING ELSE, ENGAGE



222%

YoY increase
in media allocation
on engagement-first
campaigns

[SOURCE: OSL INTERNAL DATA, 2023]



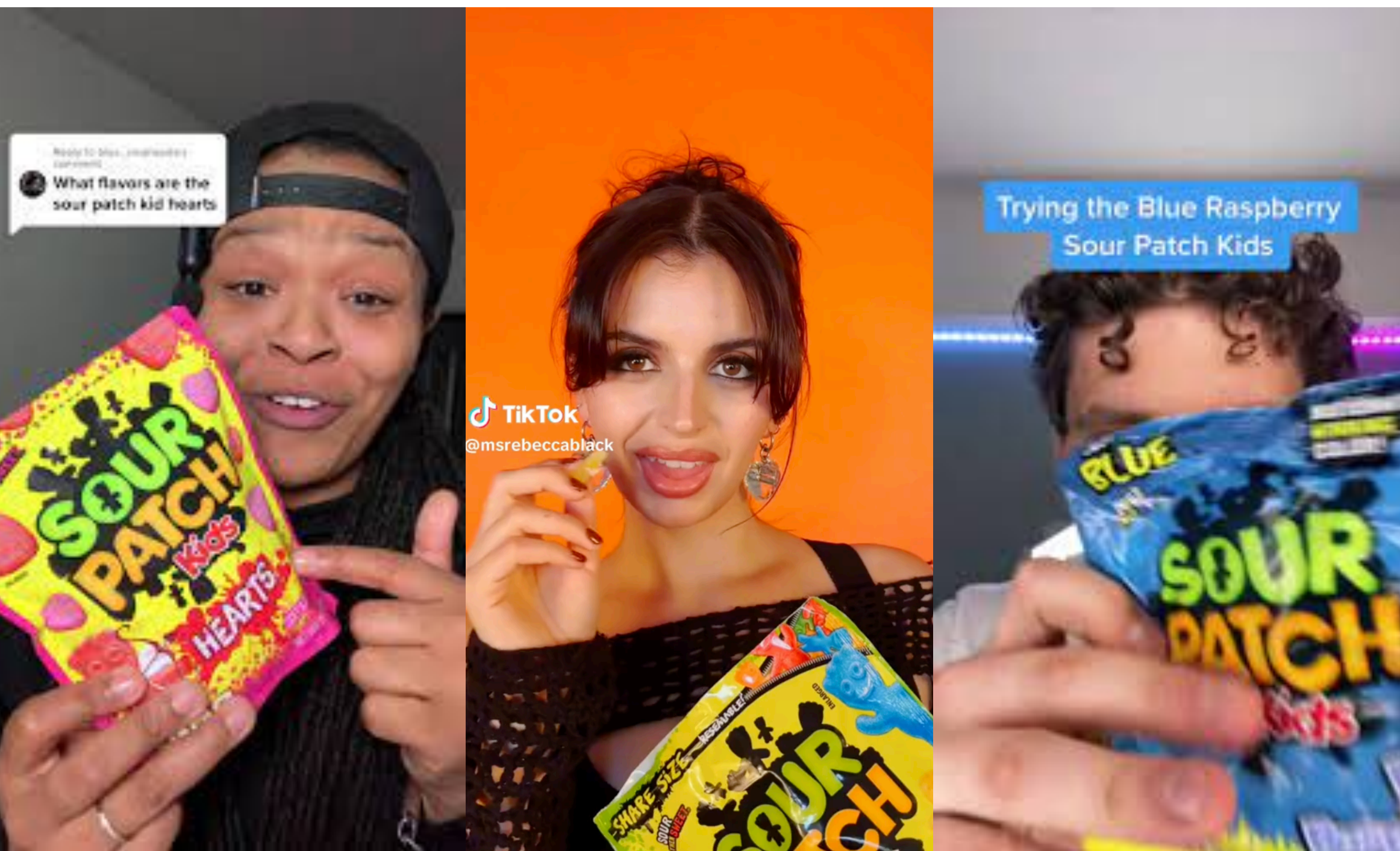
[Pierre Quievreux, Regional Head of Media, Ogilvy]

“We’re seeing a shift in media planning, inspired by an organic renaissance. Gradually we optimise less for reach and eyeballs, but brands seem to understand and prioritise the value of qualitative engagement such as repeat views, shares and meaningful interactions.”

[Aline Driesen, Integrated
Media Manager, IKEA]

“Previously we were set up for creating nice, clean social videos. But TikTok demands a completely different kind of content now. Trends and conversations change so quickly – there’s just no time for the traditional process on this platform. We need to adapt to that shift.”

[Sour Patch Kids, #GhostsFromYourPast]

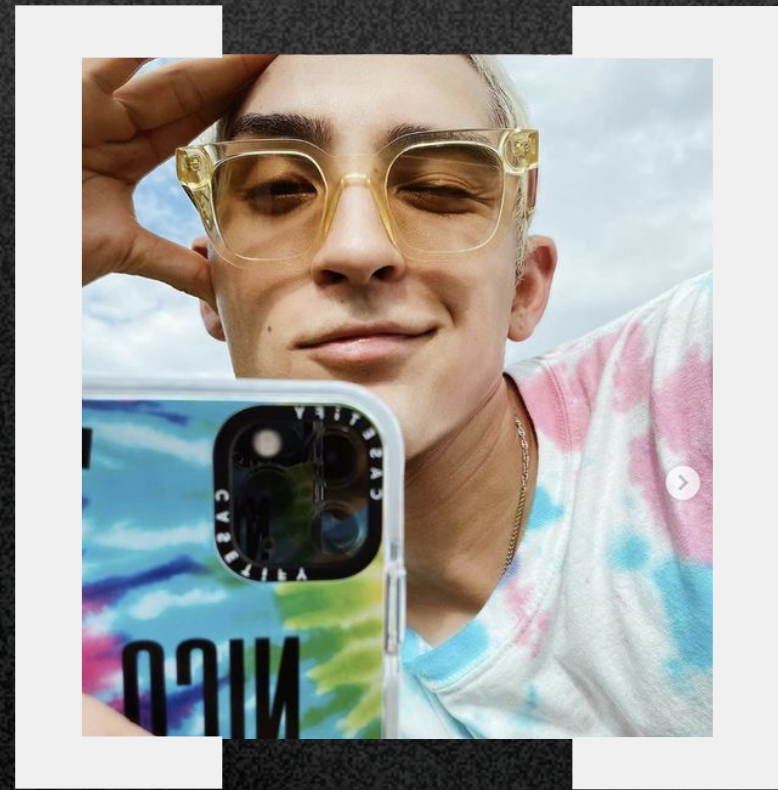


This is indicative of a bigger move away from pay-to-play approaches, meaning brands compensating for brand-first, audience-second content through paid media, towards audience and interest-first social content that’s geared for optimal organic performance.

This is fuelling a rise of brand social that’s more platform-native, and closer to lo-fi influencer generated content (IGC) or user generated content (UGC) compared to the “TV spot social cut-downs” that dominated previous years.

This trend towards less formal, yet more engaging content calls for a radical reconfiguration of big brand social set-ups to deliver content that is the antithesis of traditional advertising best practice: unscripted, unpolished, unpredictable.

VIDEO: THE LONG & THE SHORT OF IT



58.5%



of time on social
will be spent
watching video

[Rashi Lakhota, Senior Manager
Brand Creative, Absolut Global]

“I’m re-evaluating my take on long form video, because of course, we know snackable content works. But, if it's adding intentional value and it’s not just frivolous promotion, you have consumers’ attention.”

[Bubbaloo, Bubba Talks]



[SOCIAL MEDIA TRENDS 2024]

TikTok is the new TV, and watching video remains the dominant consumer behaviour compared to other social media activity.

The dominance of TikTok and Instagram Reels, and the uptake of YouTube Shorts speaks to consumers’ enduring love for punchy short clips. In the year ahead however, we expect a rise in longer video, which offers more potential for ad placements and creative brand content (think of tutorials).

Who can forget Hilton Hotels’ 10-minute blockbuster TikTok ad of 2023? Or look at how YETI highlights grassroots organizations. Expect your favourite brands to develop a layered social video strategy, with punchy shorts for hard-hitting messages, coupled with longer edutainment style content and explorations into ownable serialized formats, from talk shows to lifestyle.

For brands in 2024 the priority will be testing and balancing short and long form video. This is something Mondelēz’ Qaiser Bachani sees across his organisation as well: “what cuts through in a short format, might be a valuable entry point for long-form content. For our brands - where storytelling really matters - it’s important to have that extra length across different platforms”.



AI IS INESCAPABLE





[Create Real Magic, The Coca-Cola Company]

[Stanislas Magniant EMEA Director, Social Media Listening & Engagement, TCCC]

“I find myself as excited by the prospect of this new cycle of innovation as I was when social emerged 10-15 years ago. With Coca-Cola and OpenX* being pioneers in this space, this couldn't be a more exciting time and place to harness GenAI to accelerate our marketing transformation.”

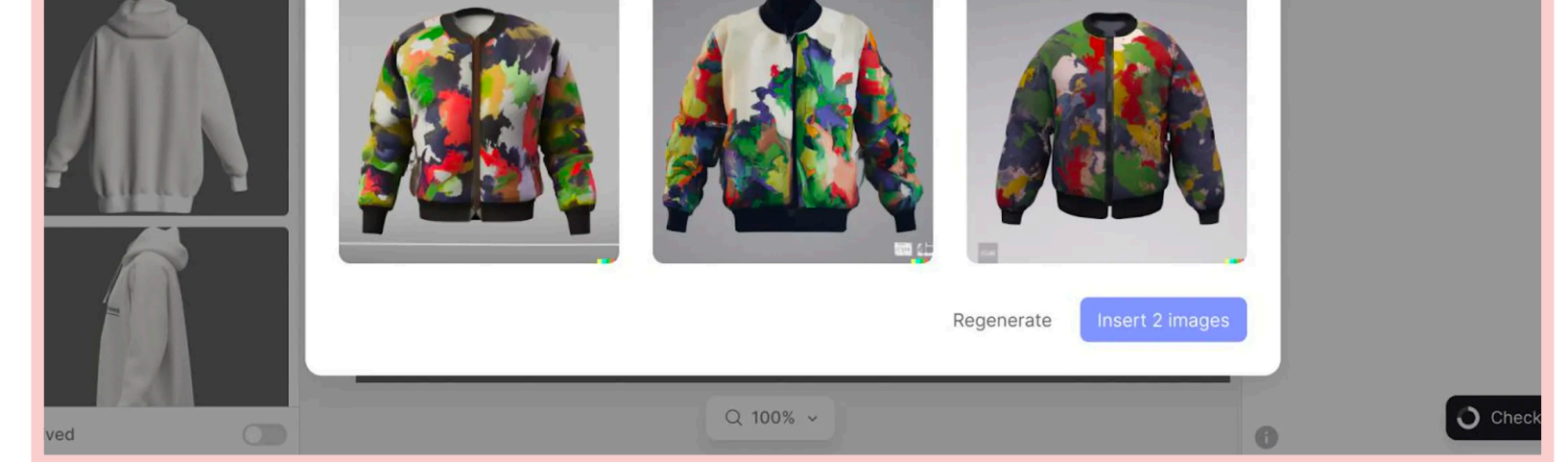
(Gen)AI is poised to turbo-charge brand social teams in 2024.

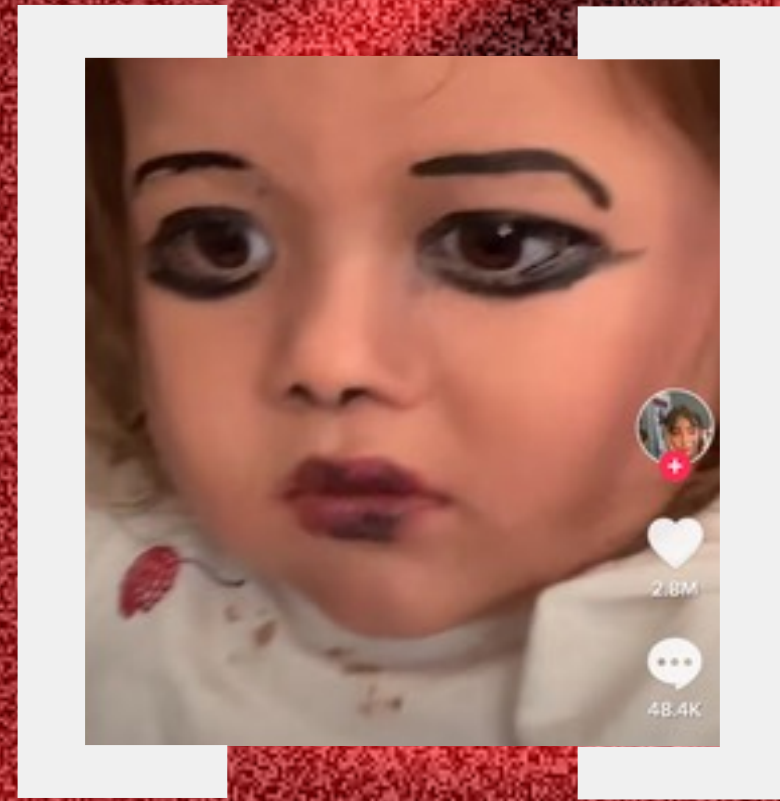
A lot has been already said and written about AI, so we don't want to overdo this. The emphasis on machine learning and democratisation of AI will increasingly automate community management functions like social monitoring and customer service, whilst equipping brand teams with a wealth of data on customer behaviour, sentiment and social listening.

This will empower teams to prioritise high potential interactions with a human touch, as well as more strategic and creative initiatives that take brand efforts to the next level.

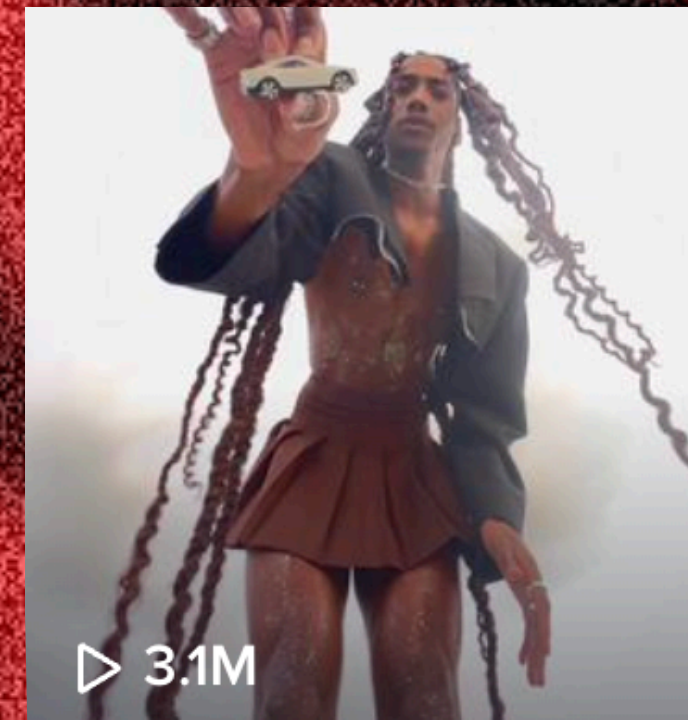
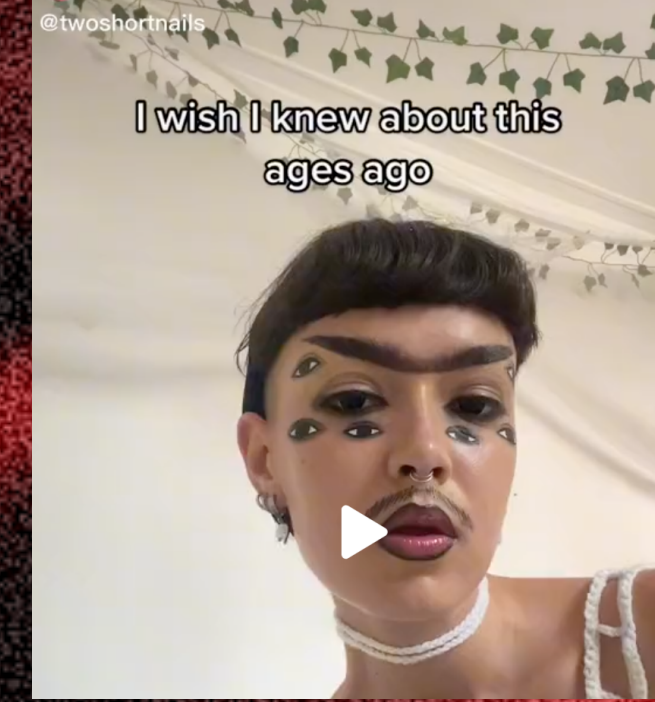
Also - and this is crucial for platforms suffering from the loss of data signals and cookie cutting - well-trained AI models can support in providing deeper and relevant targeting solutions for personalised content delivery (e.g. Meta's Advantage+), conversational search (Google's Bard), as well as optimisation (think TikTok's AI-powered creative assistant feature).

On the creative front AI will also evolve rapidly in terms of richer and more tailored output. From conceptual assistance and the evidently limitless possibilities of generative content creation (check [Coca-Cola's Create Real Magic](#)), to AI megastar personalities fronting big brand and purpose-led campaigns. [Cadbury's Grand Prix-winning Shah Rukh Khan My Ad campaign in 2023](#) was a strong signal of what's to come.





TIKTOK TOP RANKING



Platform usage by the youth cohort provides a temperature gauge on the state of big social's legacy platforms.

Amongst Gen Z users, TikTok's rise remains relentless at around 1,6B in Q3 of 2023, and we believe this phenomenon will continue in 2024.

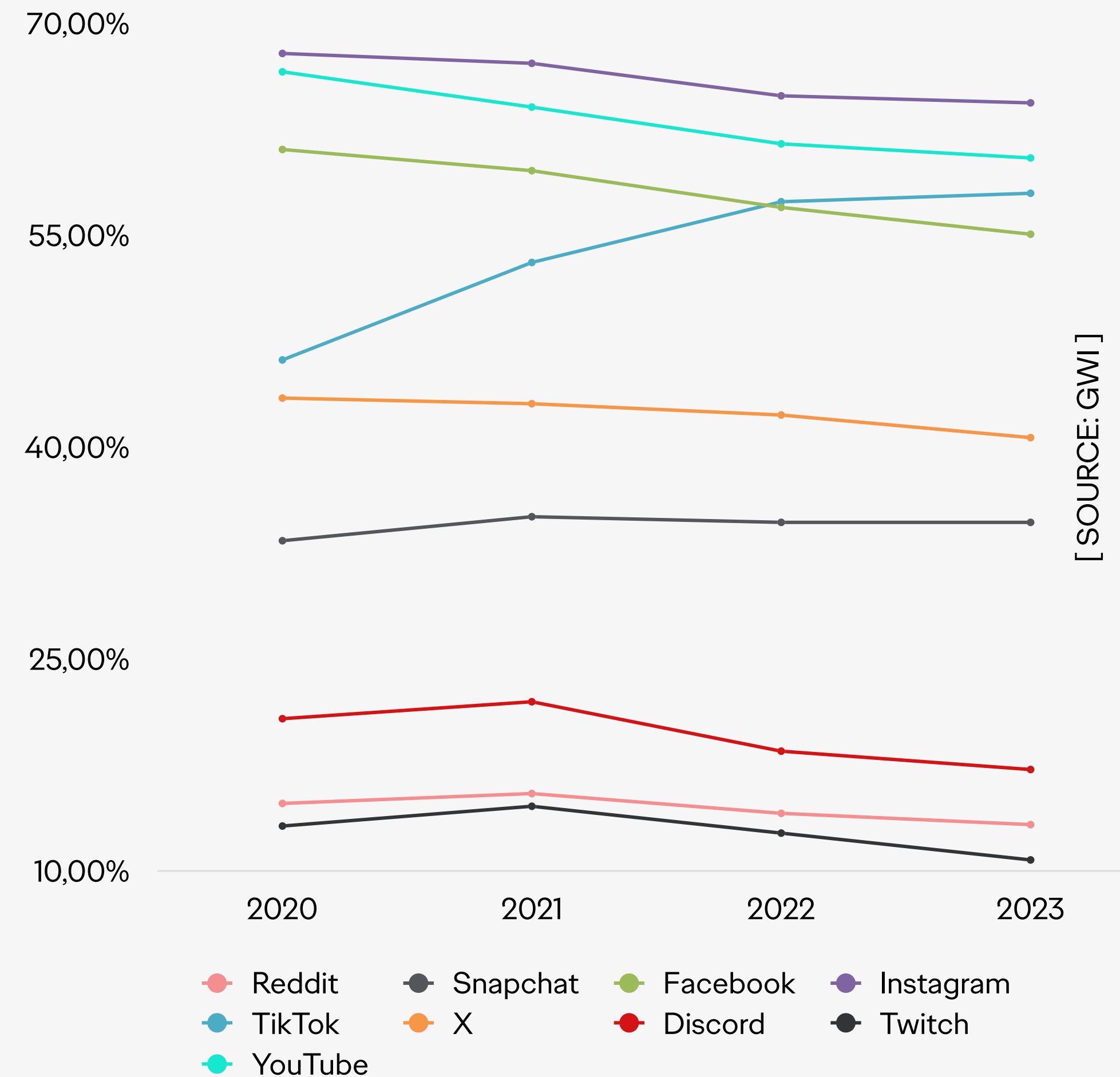
Having comfortably surpassed Facebook and Instagram in terms of time spent per session, TikTok is the most important platform for big brands to crack in 2024. Snapchat is the only other major platform showing 2023 growth. X predictably has fallen in the wake of management and platform turmoil.

However, despite its absolute numerical success, TikTok needs ongoing refinement to maintain its top position. Recently, more ad-supported segments were introduced, supporting TikTok's ambitions to become a super app for users looking for more than serendipitous scrolling in the For You feed.

For instance, the platform reinforces last year's trend of being one of the primary search destinations for Gen Z. This led to the introduction of the Search Ads Toggle, enabling advertisers to gain more visibility within the platform's discovery engine. In terms of its advertising pillar, TikTok is estimated to grow in 2024 with double digits.

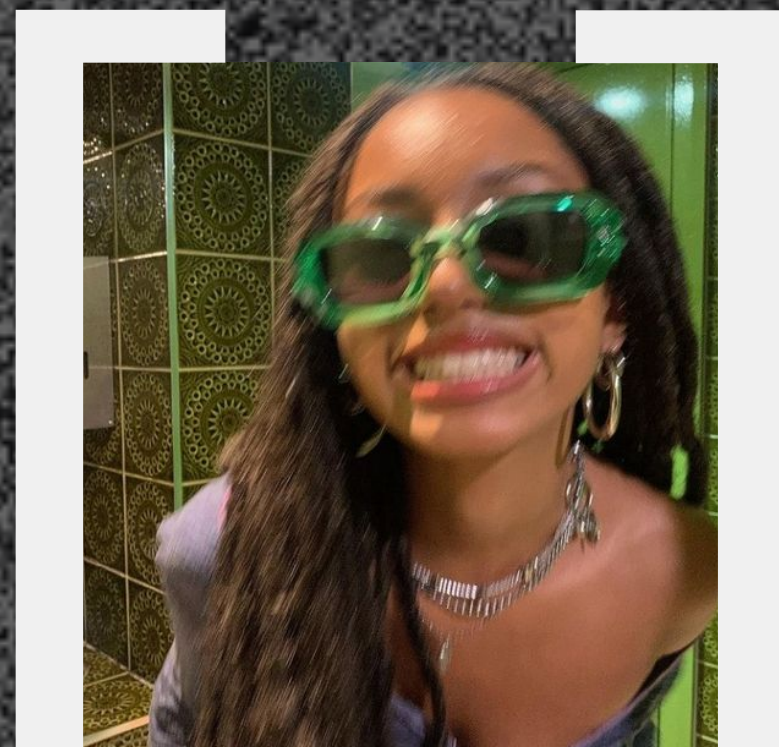
Additionally - while other social networks scaled back on this - TikTok expanded its inventory with shopping ads and social shops, aiming to get more grip on commerce and affiliate marketing. Yet, live shopping no longer seems to be a priority. At least not in the West.

Platform usage among Gen Z globally - % that use at least monthly or more





META STILL MATTERS



More than just the 20th anniversary of its blue app.

For Meta, 2024 will be a season of further experimentation in a continued bid to win back lost share of attention. AI will of course play a strong role in this, offering new possibilities for creative content creation and solutions for direct response advertisers. It will also continue to nurture Threads, the micro-blogging X competitor that’s now rolled out across major markets worldwide and is further preparing its entry into the decentralised space.

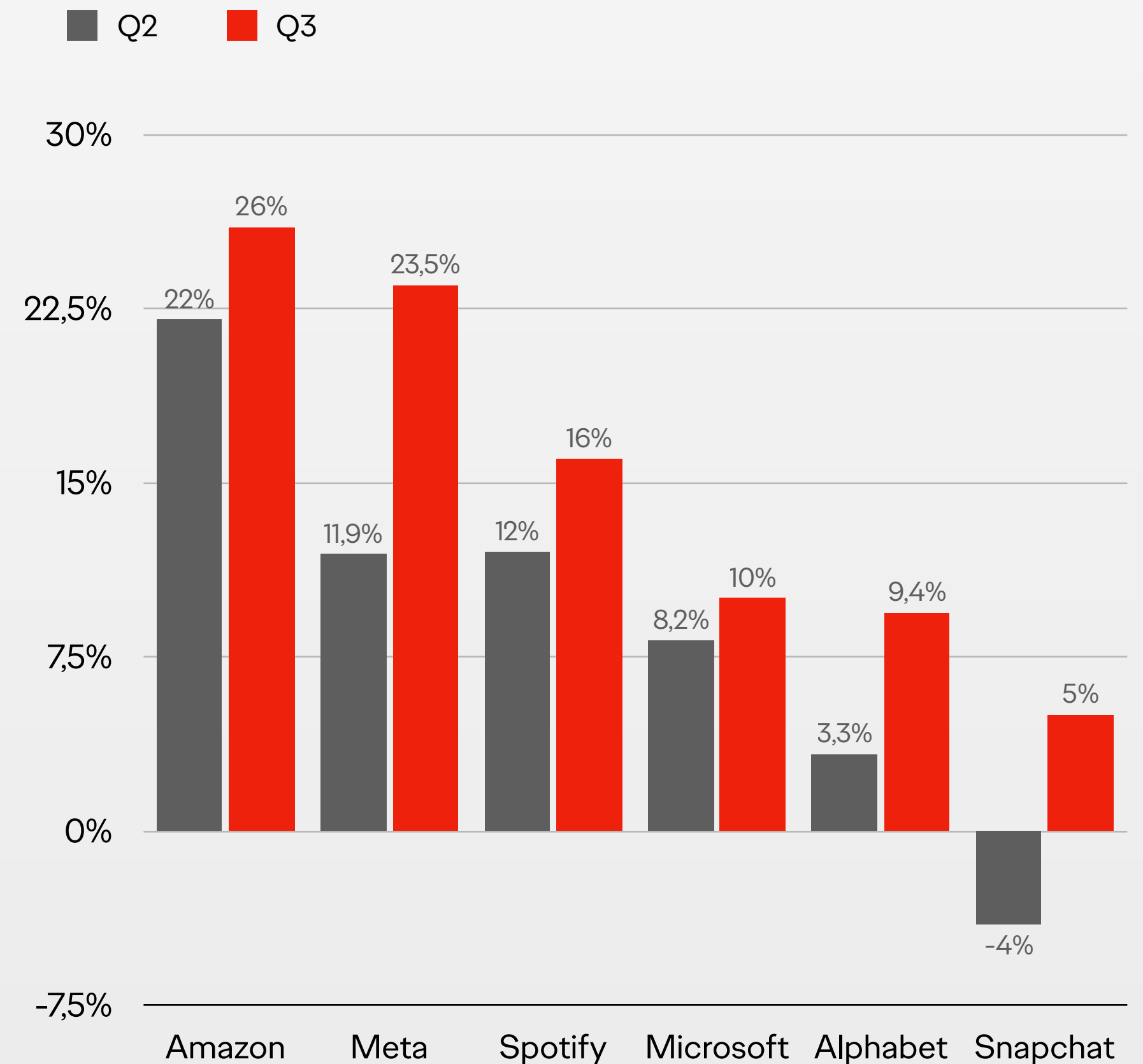
Meta’s legacy ecosystem should not be under-estimated. It remains a leading ad destination worldwide (recording more than 23% YoY growth and 98% of Meta’s revenue comes from ads).

Also, we see a shift that the Meta ecosystem is particularly strong in emerging markets. Also deeper collaborations with retail media aggregators such as Amazon and further refining of its targeting traits, will allow Meta to keep reaching at scale while ensuring contextualisation as well.

For big brands, Instagram particularly will stay as a key tool in the social arsenal - a hotspot for discovery, video consumption and peer-to-peer interactions through DMs and voice features.

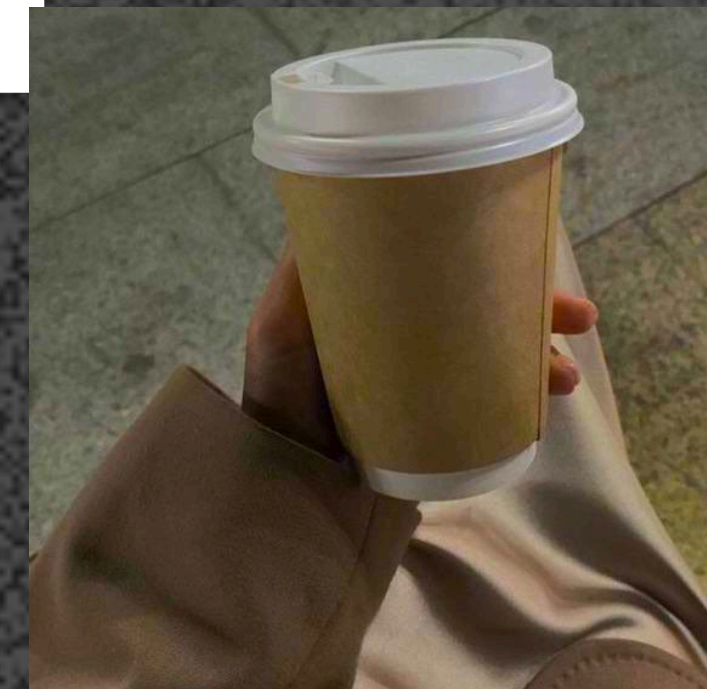
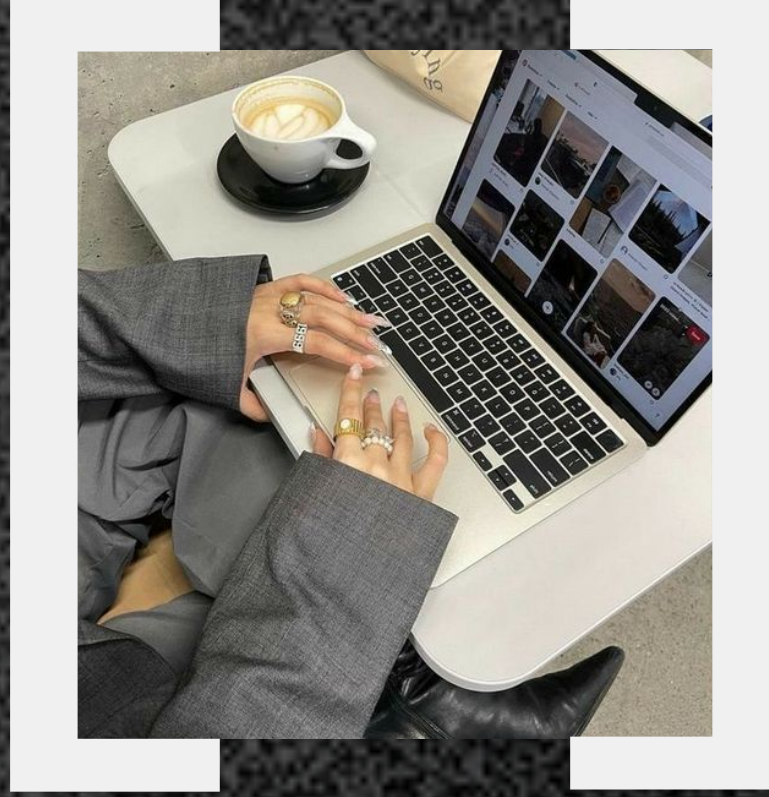
Future-focused marketers will be watching Zuckerberg’s progress in the space of ambient computing. The 2023 launch of the Ray-Ban Meta smart glasses collection is a signal of a bigger long term shift happening in social and connected culture – away from passive content consumption in closed ecosystems, towards content and tools that augment everyday experiences.

Global advertising revenue, Q3 2023 - % YoY ad revenue growth



[SOURCE: WARC]

LINKEDIN AND THE RISE OF B2B INFLUENCE



2024 will see brands become more intentional and creative in how they use LinkedIn, from upskilling staff to become vocal online brand ambassadors, to tapping into the rise of B2B influencers.

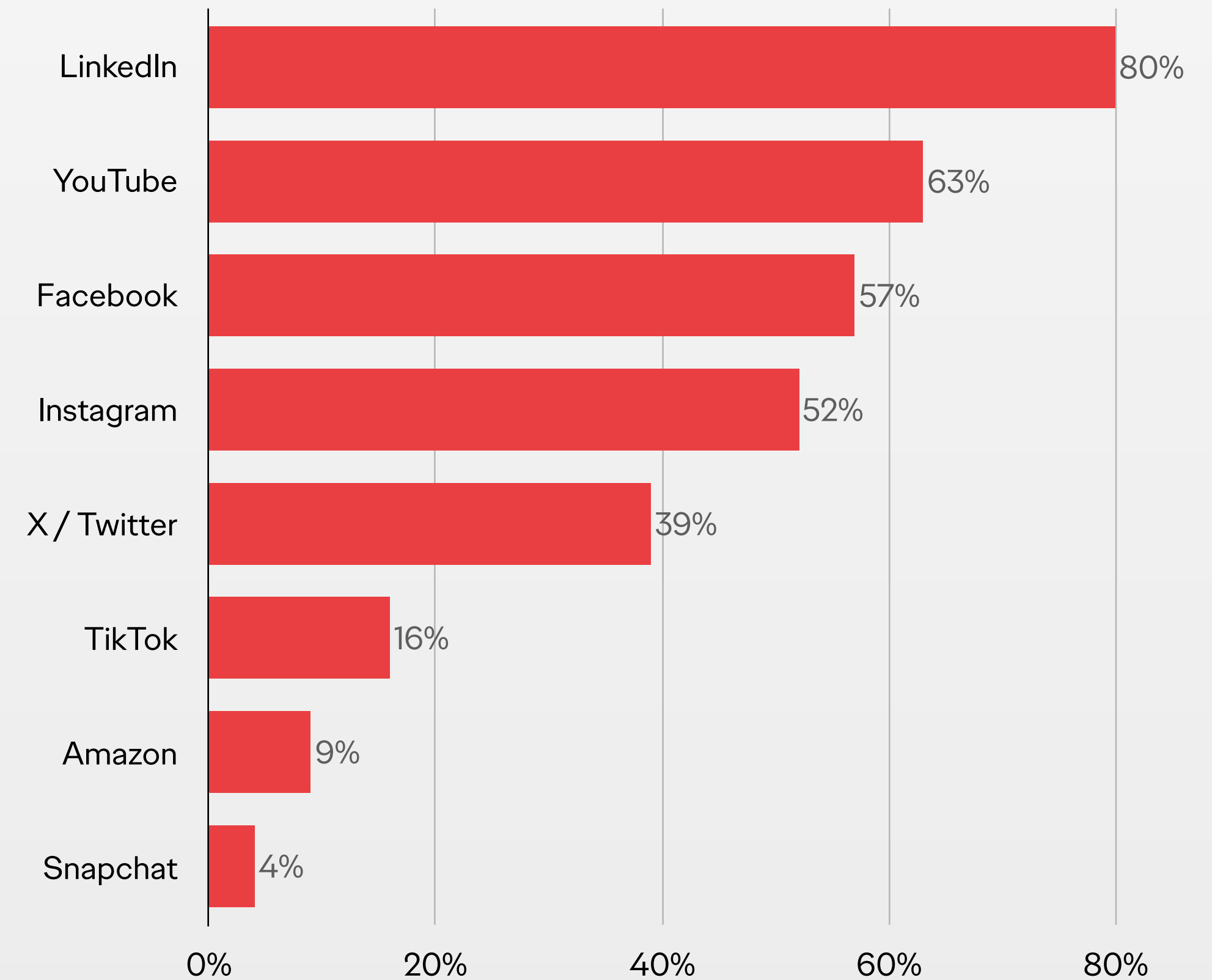
For B2B brands, LinkedIn has become an invaluable touchpoint for professionals and businesses to showcase some of their best assets - company culture and staff expertise.

75% of B2B businesses already leverage B2B influencers like CEOs, academics and doctors. Strategic employee engagement initiatives are next up, with more brands looking to incentivise staff into sharing insider knowledge through active digital networking.

We predict 2024 will see a long-due refresh of the content culture of LinkedIn, following its “cringe era” that was more clickbait than conversational. With the future of X still murky, LinkedIn stands poised to benefit from an influx of quality opinion leaders looking for a new public town hall for their thoughts. The professional social network offers a strong alternative, with more than 950 million users.

B2B influence growth is not limited to LinkedIn. TikTok with its depth of engaging audiences too is home to a burgeoning group of professionals across several industries who are finding new audiences for their expertise through snappy short-form video.

LinkedIn is the social platform most commonly used by B2B marketers and their clients worldwide



[SOURCE: EMARKETER]

04 WRAP UP

[Awie Erasmus, Chief Strategy Officer, Ogilvy]

“To succeed in the age of social 3.0, brands need to become culture-first players. This necessitates the development of increasingly dynamic social strategies that allow brands to respond to trends and shifts at the speed of culture.”

IN CONCLUSION



A primer to succeed at this:

- Activating intelligence to become responsive to culture and conversation.
- Prioritising quality engagement over more traditional media metrics.
- Adopting a collaborative mindset to deliver standout and engaging brand experiences.
- Unlocking the full power of creators, both for content development and extended reach through influence.
- Meaningfully engaging communities, both from within the brand and from the outside.
- Developing fit-for-audience and fit-for-platform content.
- Putting the audience first and the brand second.

Navigating the new social media landscape might feel a bit daunting and like uncharted territory, but it is also truly an exciting time for brands with new opportunities to reach audiences in innovative, interesting and meaningful ways.

Just keep culture at the heart of your narrative and eventually you might just make it your own.

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[Disclaimer]

References are listed per trend, although there is some overlap between the different chapters. Aside from online sources, we delved into proprietary insights, conducted internal brainstorming sessions, and scanned trade publications. Please note that some statistics or numbers may vary over time. Additionally, certain platform features, formats or even networks might be discontinued or rebranded. If there are any questions about the content of this report that cannot be traced back in the references, please get in touch.

[Images]

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