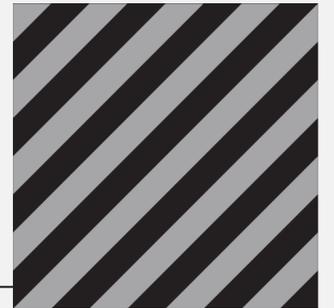


SOCIAL MEDIA TRENDS 2023

Ogilvy



FOREWORD



Welcome to 2023 and another rollercoaster ride.

First up, the disclaimer. Trend spotting is notoriously selective, subjective and vulnerable to the sideswipes of unforeseen events. This report is no exception.

We acknowledge its imperfections but believe it's important to synthesize the environment at the start of a new year and to highlight the themes and currents that will shape our industry context.

The goal is to make sense of the radical shifts out there and to provide you with a useful 'map of the moment'. And what a moment we find ourselves in.

We have emerged from the frying pan of COVID-19 into the fire of a global cost of living crisis and it does feel that the harsh recessionary context is signalling a more systemic shift, especially when the way we work is fundamentally changing, the signs of environmental turmoil are everywhere, and there is the desperate and unpredictable war on the eastern front.

Add in the deceleration of the pandemic boom for tech companies, and we get a unique environment for 2023. In this stressed context, consumers are making tradeoffs, advertisers are super cautious, and competition for attention is intense.

This report does not set out to decode this broader environment in detail (we're ambitious, but not that ambitious). Instead, we've taken a more focused approach by looking at the industry environment through three lenses:

- What's shaping Content & Channels**
- What's emerging in Connected Commerce**
- What's shifting with Influence & Creators**

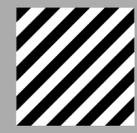
We've chosen these filters to organize our perspectives and make more sense of the messy reality. These filters are also very relevant to us at Ogilvy.

We've used this trend-spotting process of discussion and discovery to prepare ourselves for this environment. We've workshopped all the themes in this report and have innovated our offer to be better able to respond constructively to this dynamic context.

Hopefully, this report is useful to you and your company. Please feel free to drop us any feedback. We'd love to hear your perspective on these trends and themes.

Enjoy this report.

IN THIS REPORT

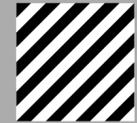


LENS 1

CONTENT & CHANNELS

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2. [Organic and earned efforts making a comeback](#)
3. [Value exchanges are more important than ever](#)
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5. [Immersive tech deepening social experiences](#)

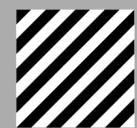


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CONTENT & CHANNELS



STARTING POINT

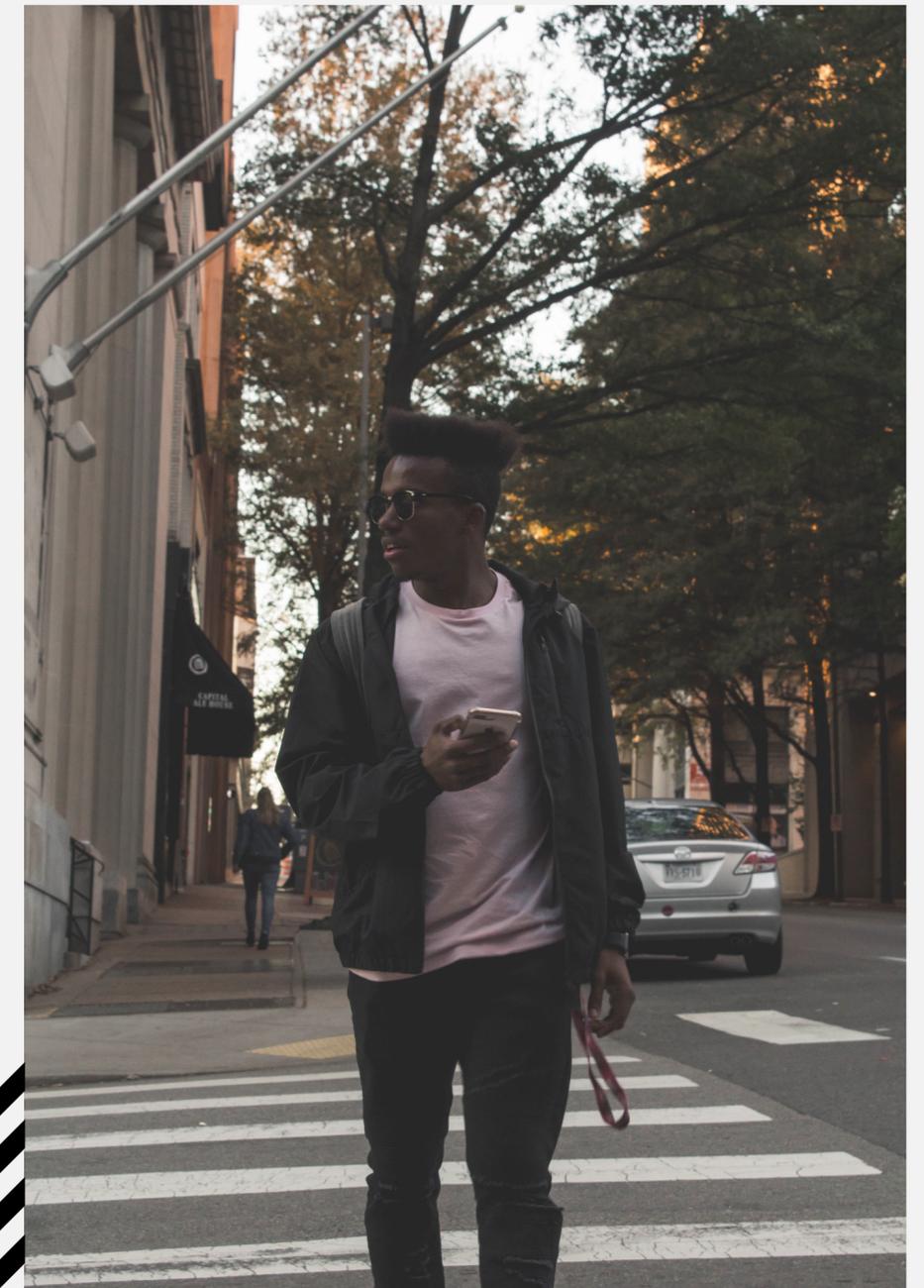
Take 2 minutes* and pause here.

If you had to draft a basic social media strategy back in 2019, what would've been the focus areas? Instagram for the cool factor? Facebook and YouTube for scale? A triple H content model? Test runs on niche platforms? Brand fame generated through influencers? With all this being optimized for paid distribution?

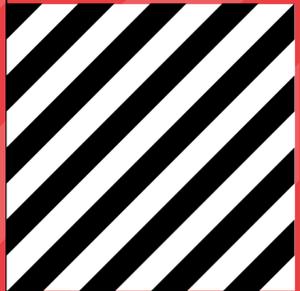
In most cases, this approach was pretty much the default. And it worked, allowing meaningful and sizeable reach to scale effectively. Today we're facing a different reality. One that's dominated by TikTok's growth, a certain counter-culture among online users and widespread saturation.

The familiar landscape has been shaken up. No longer is there a three-pronged channel monopoly to build on, nor is there a standard content rulebook to follow.

*The time limit for capturing your BeReal, in case you were wondering.



TREND 1



TIKTOK TICKS
EVER UPWARD





TikTok is THE trend. It's no longer 'just having a moment'. Six years in, the short-video app has leapfrogged competitors and cemented itself as the go-to platform for both users and brands.

Many established players have copied some of its key features but, when it comes to its hyper-niche algorithm and participatory culture TikTok remains far ahead while still feeling like a relatively fresh entrant.

The fastest growing social network in history (according to Statista it took TikTok 5.1 years to attract 1 billion users) continues to rewrite the rules across a variety of parameters.



REWRITING THE RULES

Organic-first

First and foremost, the platform puts the importance of having a solid organic approach back on the agenda. TikTok requires brands to seamlessly blend into its DNA and adopt the platform's codes and language by operating as creators rather than as advertisers.

The silver lining is that the TikTok community generally is very appreciative of this approach, compared to similar efforts on other networks. Duolingo, Manscaped, and Balenciaga are good examples of brands smashing it on the platform.

A cultural linchpin

A second point is that TikTok has disrupted the top-down view on culture, enabling anyone to start trends. The Corn Song is a perfect example of this - a simple interview that turned into a song, inspired thousands to create content, and resulted in several brand deals for the Corn Kid (not bad for simply stating how much you like corn).

The fast pace of evolving contemporary culture will continue to make for an interesting environment where brands can test and learn if they're prepared to have an agile and very creative mindset. TikTok's interest-based algorithm connects creators - storytellers, educators and entertainers - with communities, however niche it may be (e.g. WitchTok, TaxTok or Moms of TikTok).

Go-to space for search

A third noteworthy development is that TikTok is increasingly being used for search purposes by Gen Z. This doesn't mean it will overtake Google any time soon because search engines by design are more functional. But TikTok's stream of inspirational search results is pretty much in line with their infinite feed scroll which provides, as nicely expressed by The Verge, "your own rabbit hole adventure story".

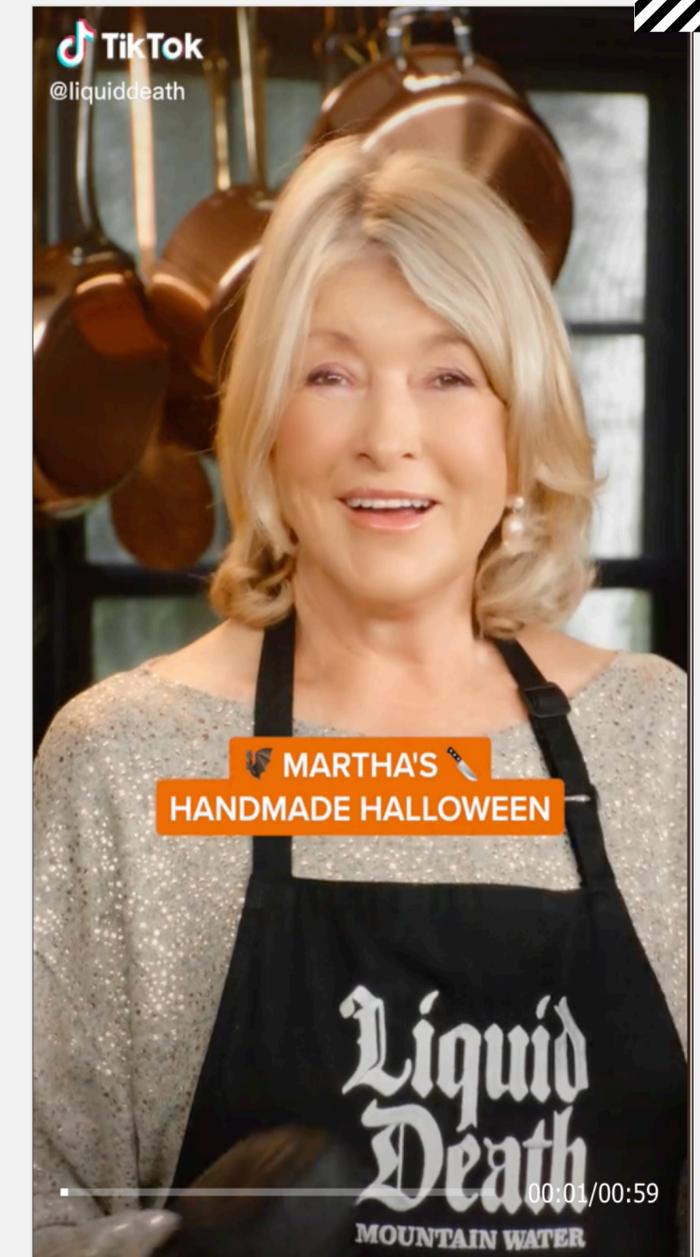
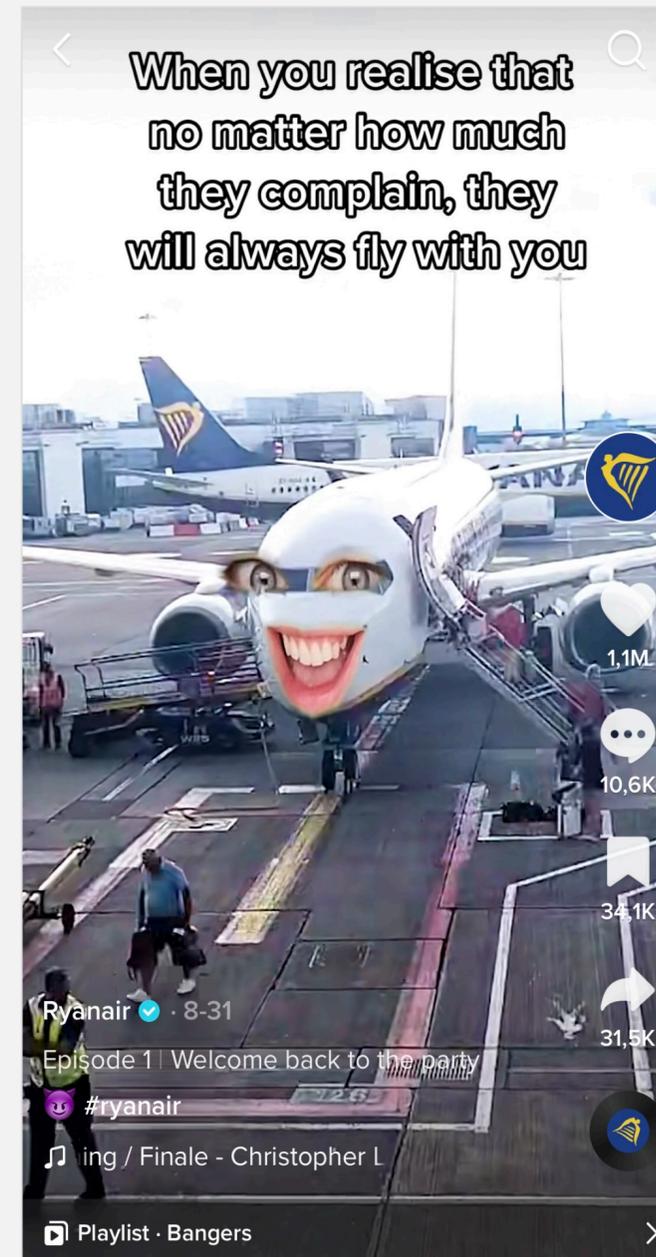
This eventually means another avenue for TikTok to stack up watch time, finetune their algorithms and boost the overall stickiness of content.



In line with TikTok's growing ad business (approximately the 4th biggest digital ad destination in the US) we also expect to see the introduction of more commerce capabilities on the platform in 2023, like the recent US launch of TikTok Shop. According to eMarketer research, TikTok will gain 9.6M social buyers in 2023. That's more than the net increase of Meta and Pinterest combined.

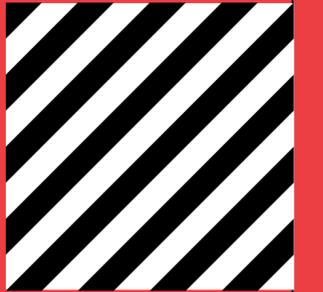
Since TikTok became the most top-of-mind space for brands to play in, we've seen a great amount of best practices (as well as cringeworthy attempts) bubble up. Those who seamlessly fit into the platform's DNA and daring to push the boundaries (and ditch all seriousness) can succeed.

Ryanair has notoriously packaged negative passenger experiences and its bad rep in an ongoing storyline combined with the hottest topics of the day. Liquid Death is another best-in-class cult brand on TikTok. The water company started out with reviews and product usage vids. Today it juggles between gimmicky celebrity endorsed content and its very distinctive UGC.



TREND 2

ORGANIC AND EARNED
EFFORTS MAKING
A COMEBACK



A SOCIAL LANDSCAPE SHAKE-UP

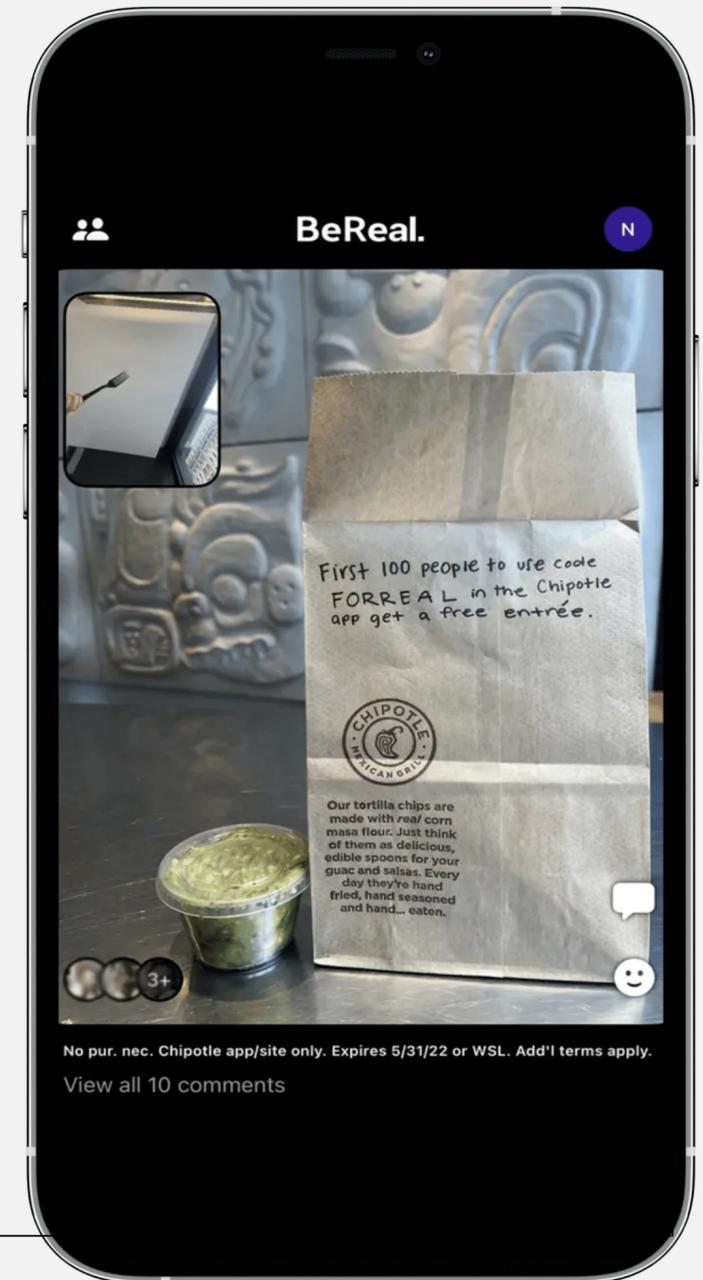
TikTok, it seems, will remain on a growth path. Legacy platforms like Facebook/Instagram, YouTube and Snapchat have all reported shrinking revenues - largely due to heavy reliance on ads, lacking innovation or, in the case of Twitter, a drastic ownership change - and we don't see that decline changing anytime soon.

But if a specific mainstay channel works, keep leveraging it. Just be aware that we expect further growth in Twitch, voice to gain traction on Discord, and newer players like BeReal (1 out of 3 US teens is using it) to become more popular.

These niche, higher affinity platforms, by default, depend more on earned user traction, and don't yet offer the same level of sophistication compared to legacy platforms.

Yet, not overtaking it seems to do the trick for now. TikTok will ensure that creator-led, lo-fi short video remains the "it" format. This has forced the likes of Meta and Google to double down on Reels and Shorts, to recalibrate functionalities and to shift towards more vertical storytelling.

And so, brands are looking left and right. And the ones that understand to operate channel-agnostic, get the points. As an example: social media champ **Chipotle** explored the ins and outs of BeReal. For now, the platform has no bells and whistles and is completely ad free. This means that brands have to fully embrace the single USP: engaging with users right in the moment and incentivise them offline.



OUT WITH UNIFORMITY



The shake-up of the platform landscape also triggered a prioritization of engagement-first objectives. Community building is making a big comeback and more often, we're returning to loyalty initiatives, speaking more directly to audiences. In the new year, we'll be seeing a cyclical rehashing of earned tactics and strategies that help deliver organic traction.

Let's be clear. Brands should not throw away the rulebook entirely. If a specific format, or content route works, keep leveraging it. The real conclusion is that today's rulebook doesn't apply to uniformity any longer. With the enormous proliferation of choice and availability, we're looking at an era of brand codes and governance that pull in the characteristics of the platform.

This is also why the time of cross-posting is over, despite what some surveys say. While it's often a cost-saver in the short run, over time the impact is limited. More efforts are needed to tailor content to each platform's unique capabilities and features.



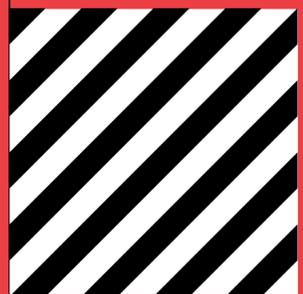
VIENNA STRIPS ON ONLYFANS

The Vienna Tourist Board got fed up with Meta's censorship of artworks published on Facebook and Instagram. So, the board moved images - considered pornographic by Meta's algorithms - to OnlyFans, rewarding visitors with free museum access after signing up. A class example of counter-culture and embracing new entrants.



TREND 3

MEANINGFUL VALUE
EXCHANGES ARE MORE
IMPORTANT THAN EVER



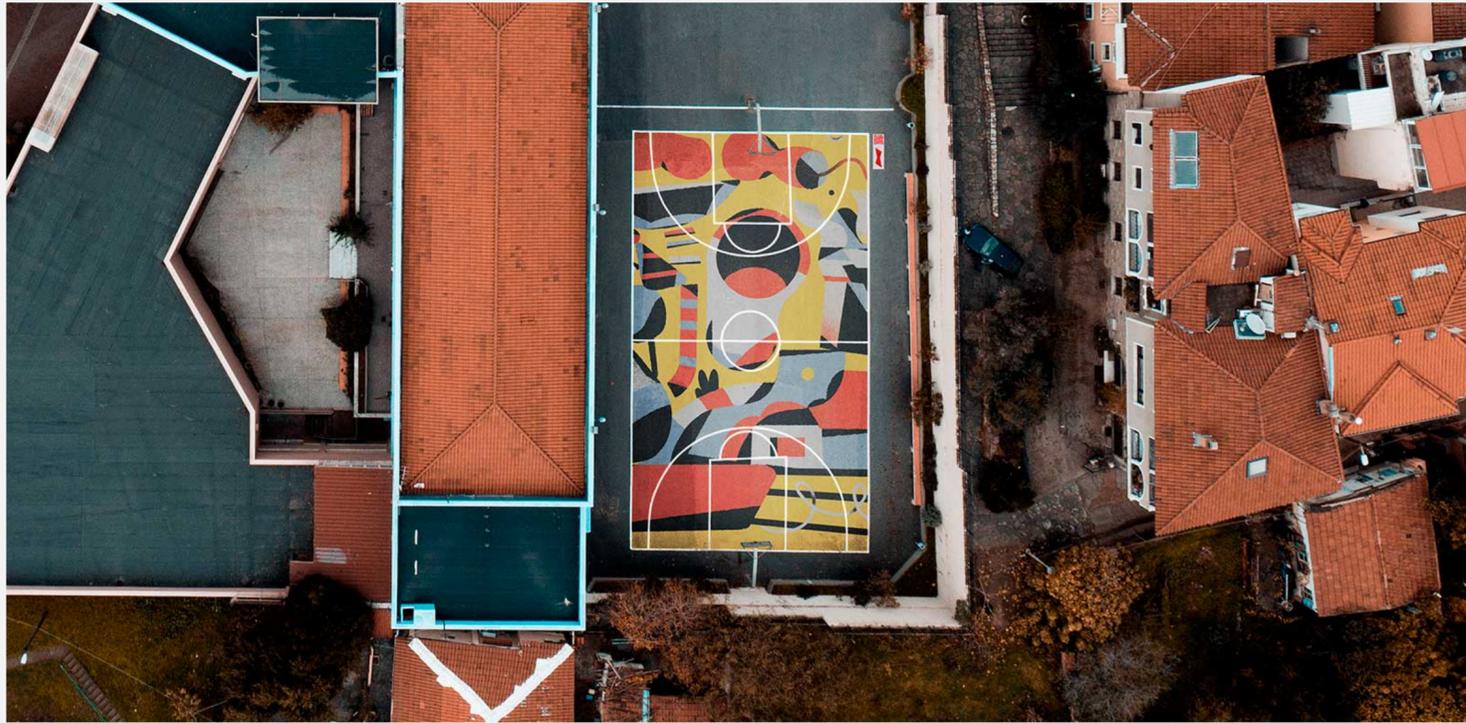
UTILITY & PURPOSE

More than ever, a content-based value exchange is about creating an emotional connection, in an entertaining way that puts consumer needs first. Across the board, we see brands who are seemingly succeeding in striking this balance. Some of them score with 'edutainment', others with nostalgia, and some going all out to activate their brand purpose as a meaningful value-add for consumers.

Whatever the output is, those consumers do expect brands to have at least a deeper dimension than just presence. Being reliable and authentic matters a great deal. GWI research highlights that 31% of worldwide respondents expect brands to help them organize their lives.

Delivering a conscious and memorable value exchange can happen in multiple ways. Through the packaging or point of sale, through a user-led incentive or in the case of this **Lego** campaign, by deliberately rethinking the purpose of its product.





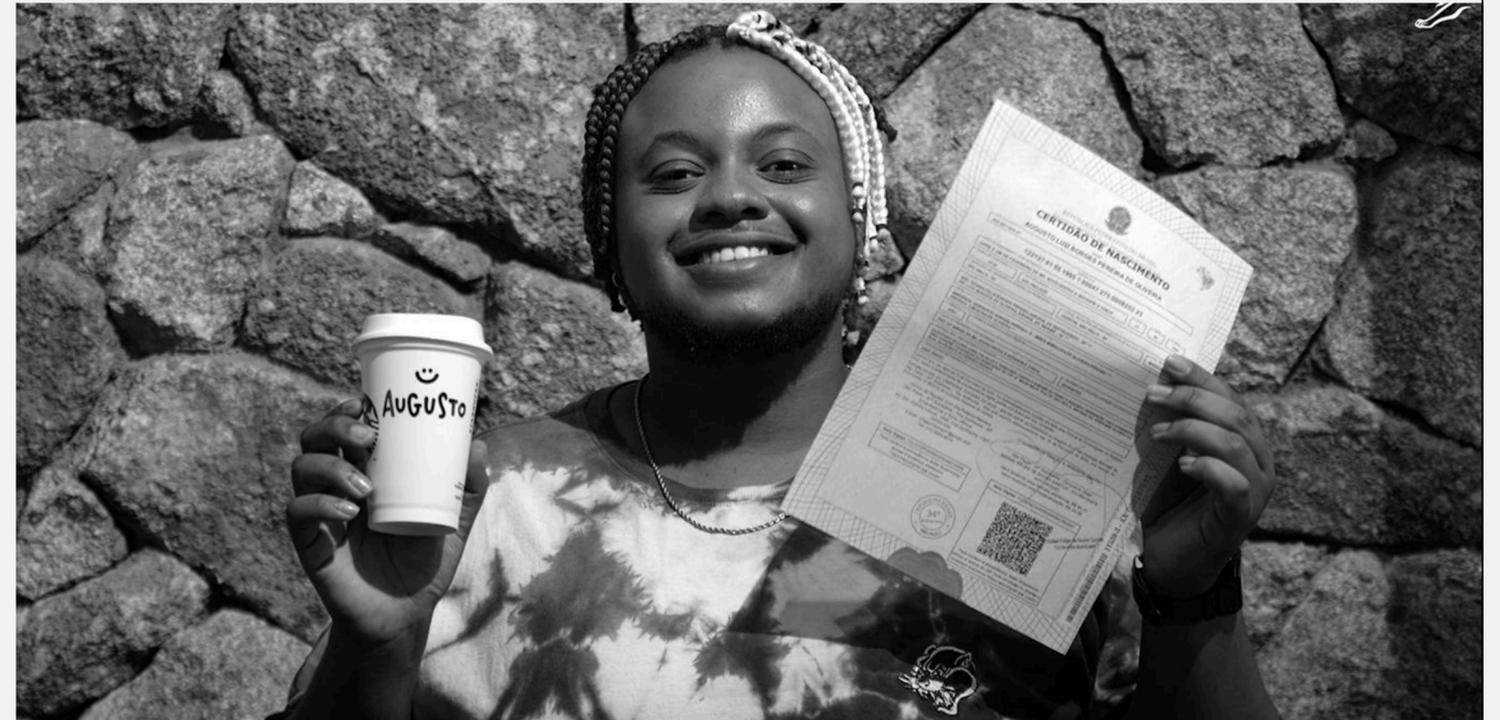
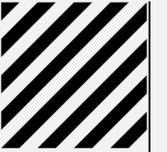
UNBREAKABLE COURTS

This Brazilian campaign commissioned by Budweiser is targeted at the attack of the country's basketball street culture by the increase in the real estate market. The activation focuses on turning courts into art and having top tier personalities to promote the message.



I AM

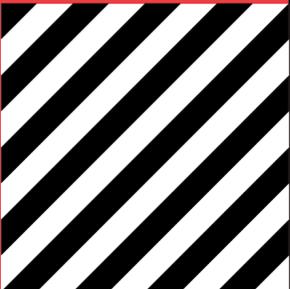
Starbucks discovered not having documentation for their chosen name was a huge problem for the transgender society in Brazil. In order to support the community, it turned its flagship coffee shop in São Paulo into a notary office where transgender people could legally change their names for free. This initiative (which was supposed to last one day) was amplified on digital and is still happening online.





TREND 4

BRANDS
WILL BECOME
ARTIFICIALLY
INTELLIGENT



WARC's annual survey reports that AI is the biggest focus area for brands ahead of live video, the metaverse or connected TV. This is because it fits perfectly in the slipstream of creator and participatory culture reflecting TikTok's success.

We're not just looking at machine learning and optimizing algorithms but at the ongoing democratization of AI which means putting AI-powered functionalities in the hands of the consumer and allowing them to create without limits.

2023 will see dozens of AI image generators pop up (think DALL-E, Stable Diffusion), as well as search-command language modelling like the widely hyped ChatGPT. The technology is not new in the industry for driving performance, delivering media efficiencies, and improving customer experiences, but 2023 could be a breakthrough year for wider (and smarter) usage of AI by brands.

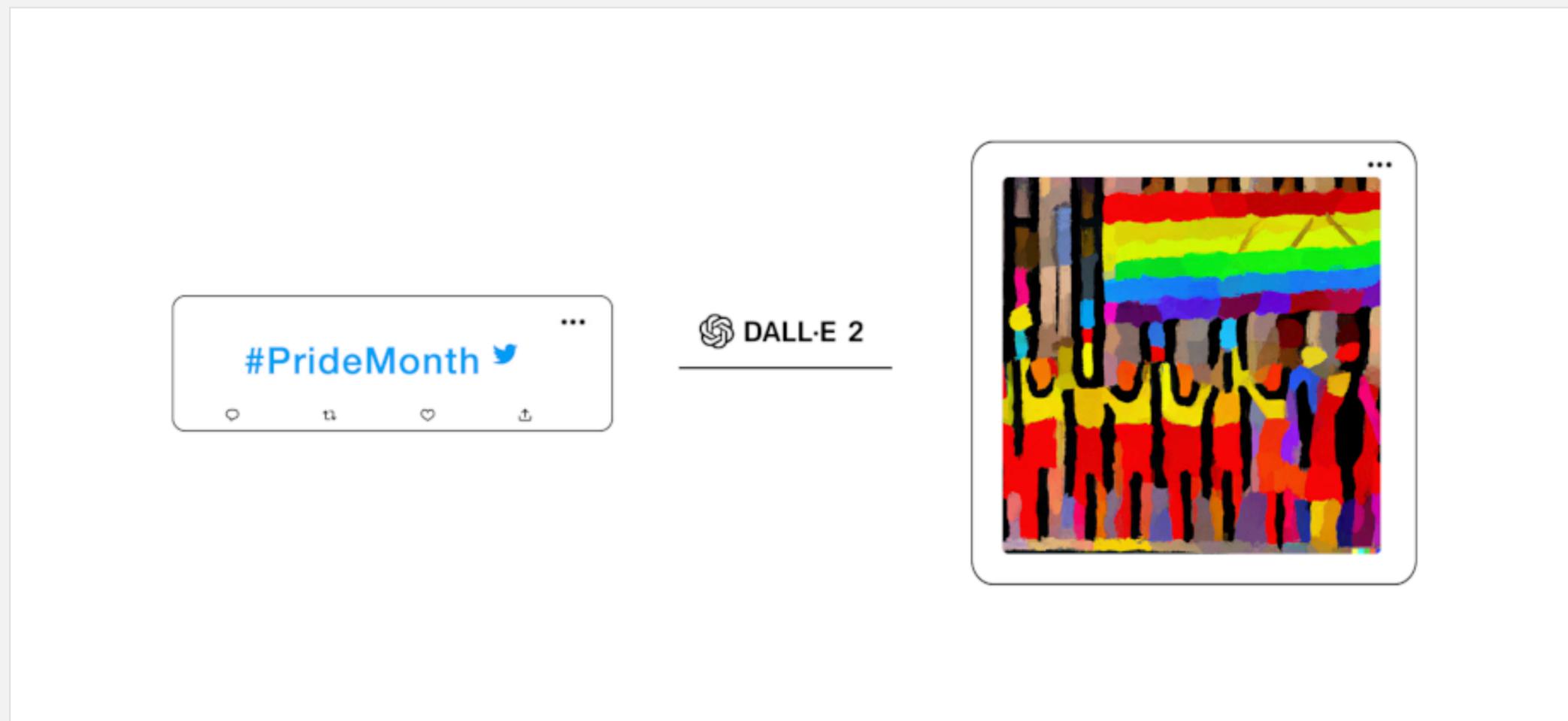
Ad agencies certainly will be leaning more on AI for creative output, deeper measurement, and translation of ideas. In particular we're destined to see a bigger uptake of generative AI, which embodies the rebuilding of content out of existing pieces such as video, audio and images.

Big CPG brands have done marketing pushes leveraging AI-powered image generators either using this internally or making it available to fans. Tools like these can help optimize search results and increase accuracy in editing. Over time, image generation could replace the stock photo market and equip creators beyond what's within immediate reach.



HEINZ AI KETCHUP

Heinz conducted an experiment where it asked the audience to go completely limitless with OpenAI's image-generating technology DALL-E 2 to 'draw ketchup'.

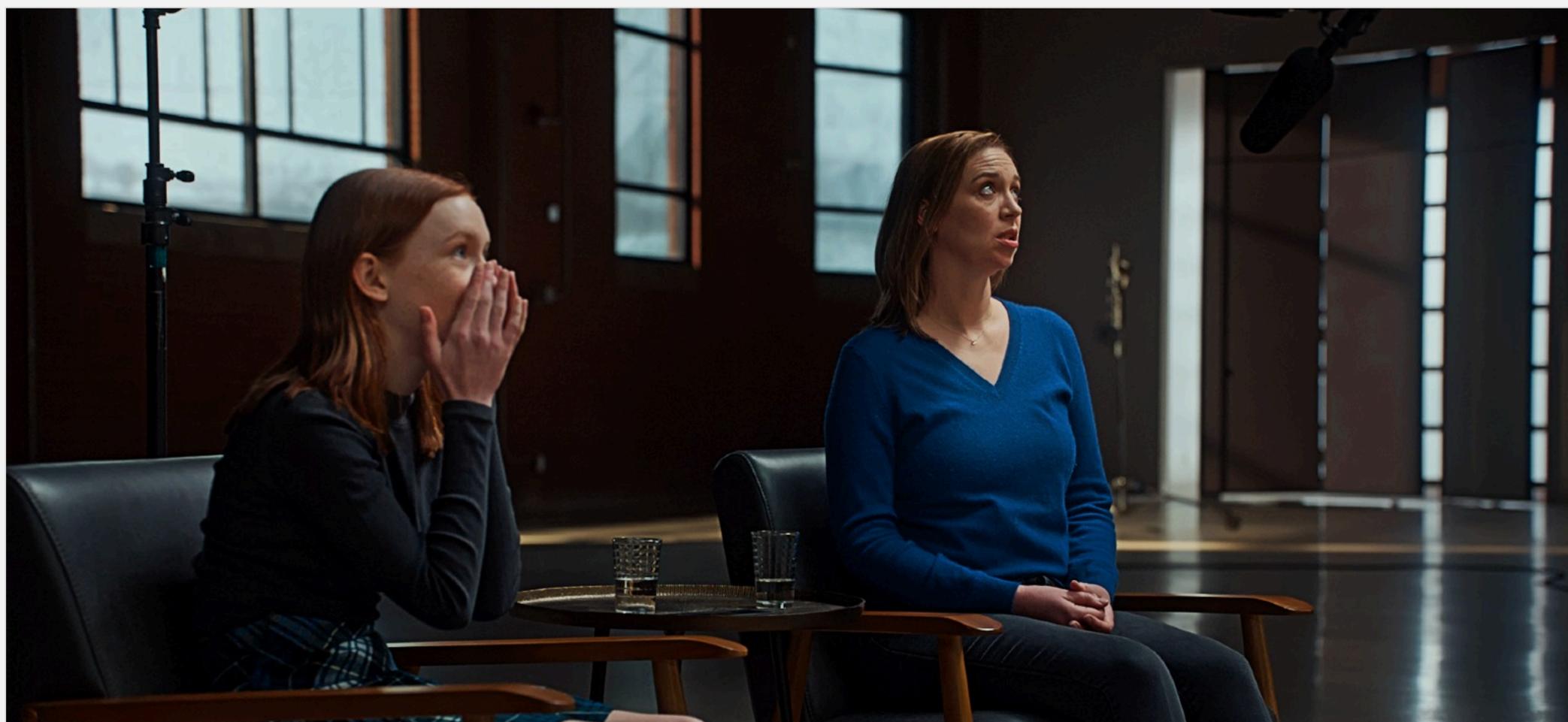


ART OF TRENDING

The Woods Art Institute in Hamburg conducted a real-time art experiment to connect with younger generations.

Trending topics on Twitter were linked with DALL-E 2 to create the most contemporary and realtime exhibition curated by everyone.





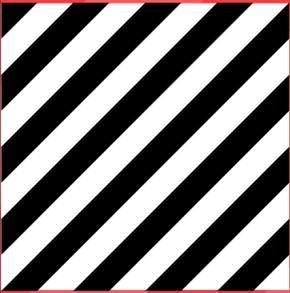
TOXIC INFLUENCE

Dove partnered with Ogilvy US to create the Toxic Influence campaign, which inspires and empowers young people to turn their social media feeds into a more positive space.

To land a powerful narrative the production team used AI-led deepfakes of mothers giving their daughters toxic advice, similar to the negative cesspool social media sometimes can be, leading to an eye-opening confrontation.



TREND 5



IMMERSIVE TECH
DEEPENING SOCIAL
EXPERIENCES



IT'S BIGGER THAN META

2022 was not a good year for Mark Zuckerberg's metaverse baby. After spending more than \$10BN, traction remains low with the user experience described as lackluster. But there are many other metaverses (primarily in gaming) with at least 400m users - Roblox leads with 230m followed by Minecraft's 165m.

According to WARC's annual survey 29% of interviewed marketers view Web3 and gaming as most significant to their plans, up from only 10% a year ago. Once the PR dust settled (because at one point every major artist was performing in Fortnite), we started seeing more robust metaverse experiences across the board.

Gucci created its permanent digital space Gucci Town. The premise is simple: capitalize on scarcity (even if only virtually), gamification and community. Chipotle, who leads by example when it comes to immersive experiences, used Roblox to engage with users, let them customize burritos which they can get for free in a physical POS, combining the best of both worlds.

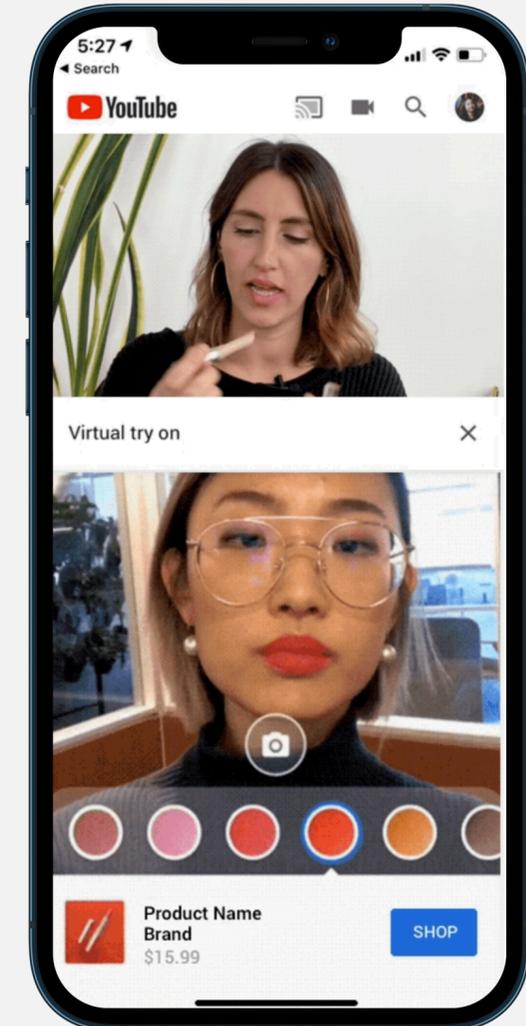
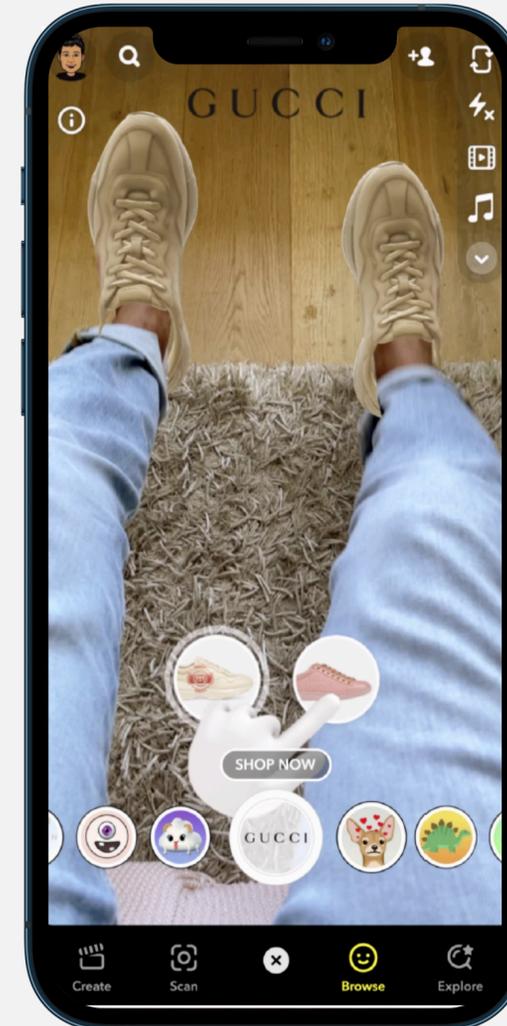


MAINSTREAM AR: SLOW COOKING

While the general belief is that the future of the metaverse hinges on the adoption and maturation of Virtual Reality (VR), Augmented Reality (AR) is more likely the way it becomes real for most people in the near future.

AR is a much more democratized technology which creators can use to generate their own experiences far more easily than they can with VR. With so many devices able to display AR, its penetration and growth is far greater than any other immersive tech.

Snapchat has been the undisputed leader in social AR tech but we are seeing huge advances within TikTok and the Meta ecosystems. There is also much talk about Mixed Reality (MR) and Extended Reality (XR) which creates a 'digital twin world' engaging all our senses. But they are a long way off becoming mainstream.





01 TikTok is rewriting and dictating the rulebook beyond content. In 23 the platform will impact the commerce and search fronts.

02 We're in a social media landscape shake-up. Legacy channels and new entrants triggering brands to think tailor-made and upscaling organic/earned efforts.

03 If attention is a key metric to monitor, offering a meaningful content-based value exchange is the best way to be distinctive and relevant.

04 23 will be a pivotal year for AI to engage and create with communities. It can also play a significant role in the creative process in ad agencies.

05 Immersive formats and metaverse experiences are gaining traction. Yet, mass adoption is not for tomorrow.

CONTENT & CHANNELS SUMMARY



CONNECTED COMMERCE

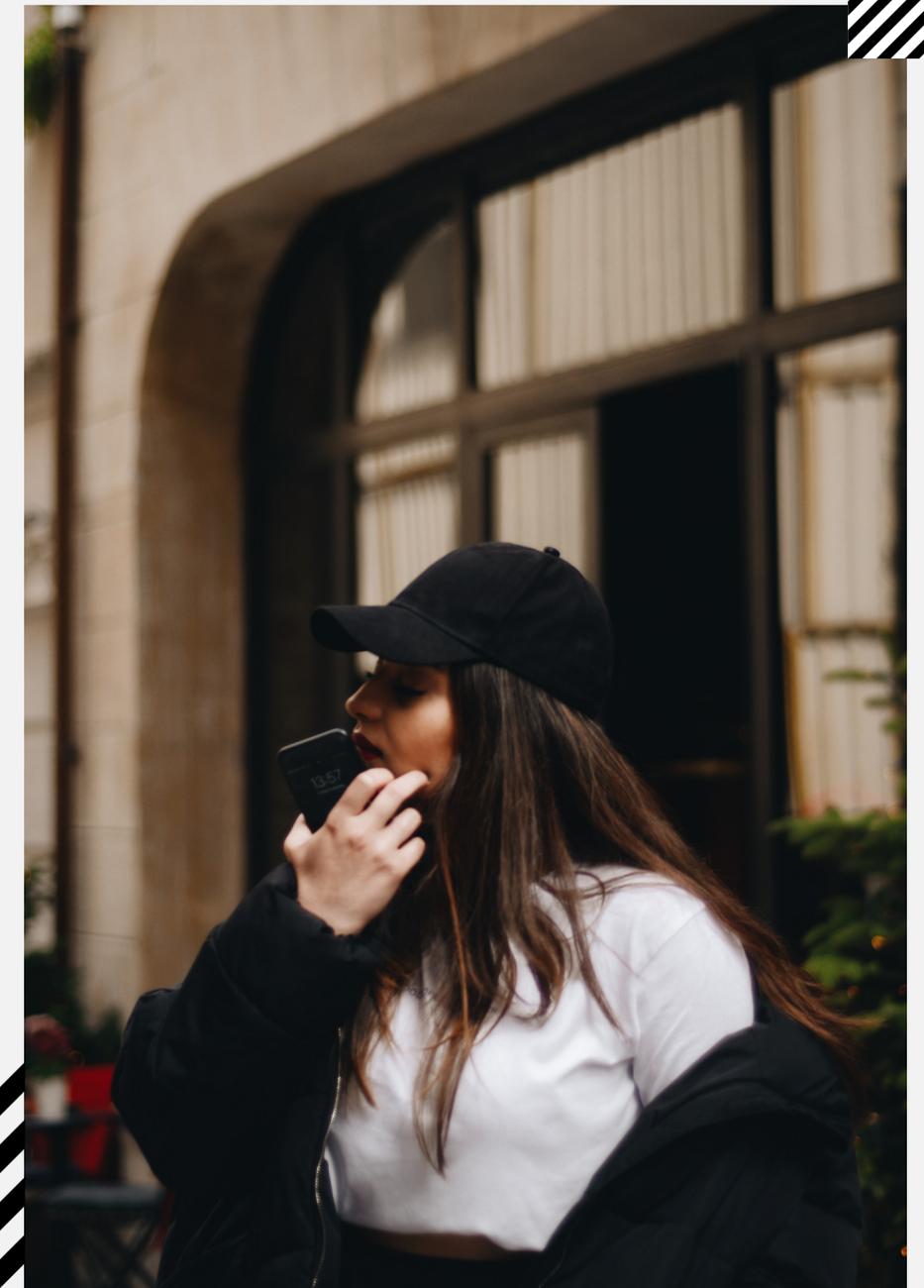
STARTING POINT

Social commerce (direct sales via a social interface) had a somewhat slow-mo year. Some talk of it as a ‘U-turn’ or even a full-on decline.

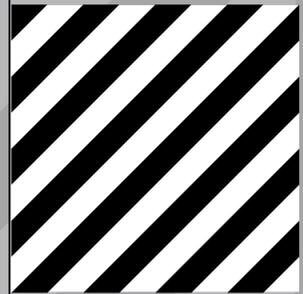
We’re urging caution in that negative view given that there’s already an estimated +\$580B global business in this space with plenty of room for further growth. And in the UK, 1 out of 3 Gen Zers now start their purchase journeys on social.

There’s no doubt that, despite in-app purchase features becoming more advanced, the trend of buying directly through social has levelled off, triggered by trust barriers, attribution vagueness, clunky features, targeting and IDFA crackdowns implemented by the operating systems.

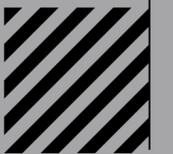
We believe that 2023 is the time to re-assess the principles of social commerce and explore the notion of ‘connected commerce’. And we believe that the case for continuing investment in this space is stronger than the one for halting it.



TREND 1



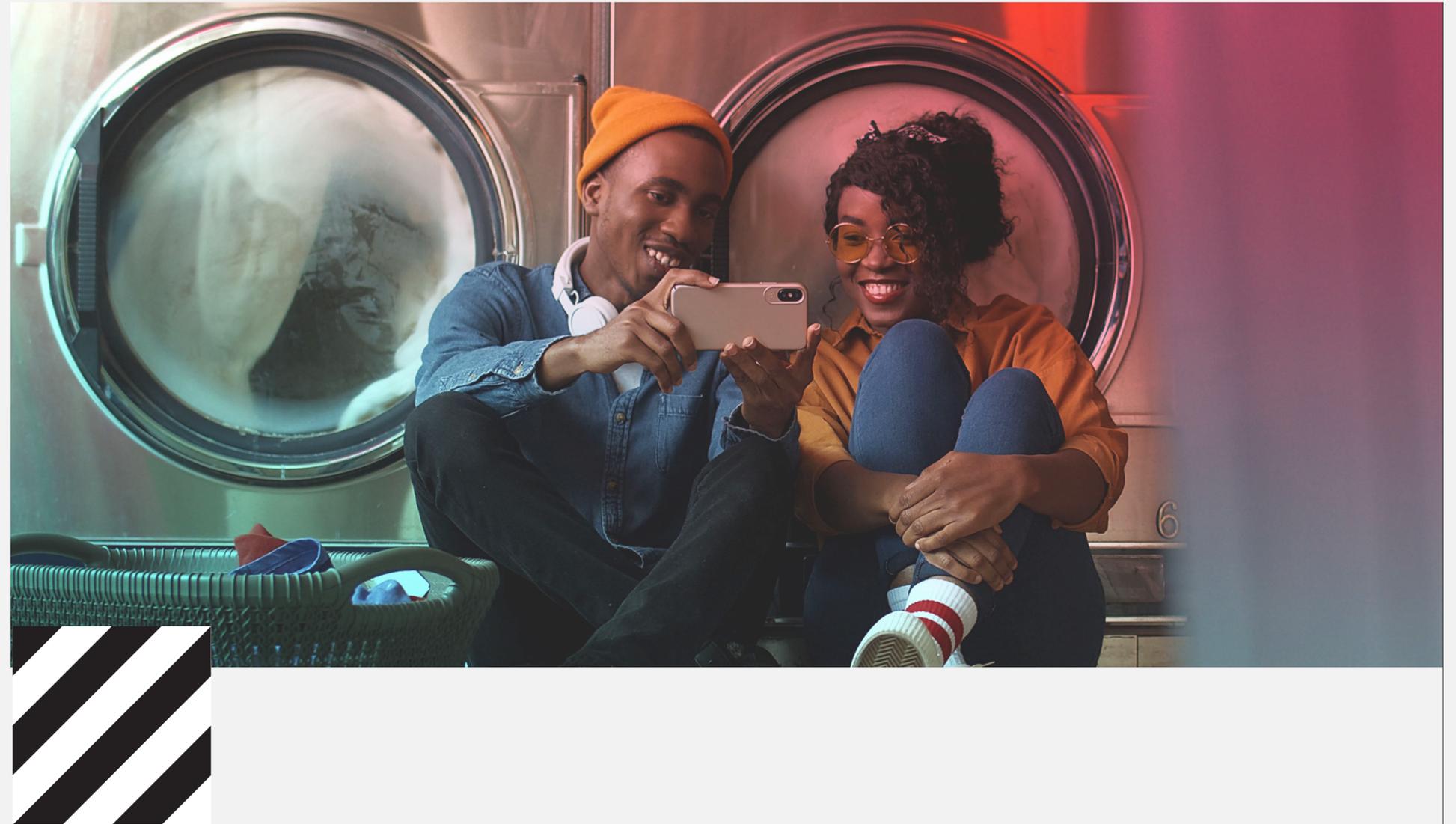
THE DISCOVERY
CHANNEL



2020 and 2021 saw Meta and Bytedance release multiple commerce features. 2022 saw many of them axed. For example, live shopping and affiliate sales didn't take off as they had in the East. In short, we're still far away from promoting a social super app.

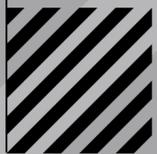
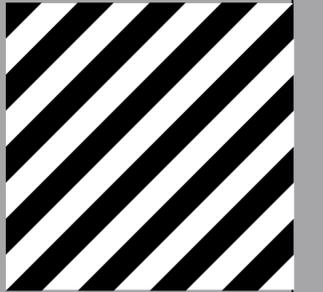
After looking at the different usage occasions, it's become clear that the real opportunity for social commerce sits within the crucial step before checkout.

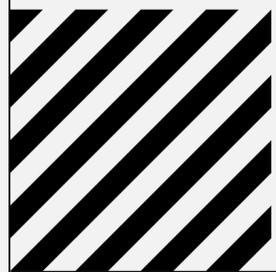
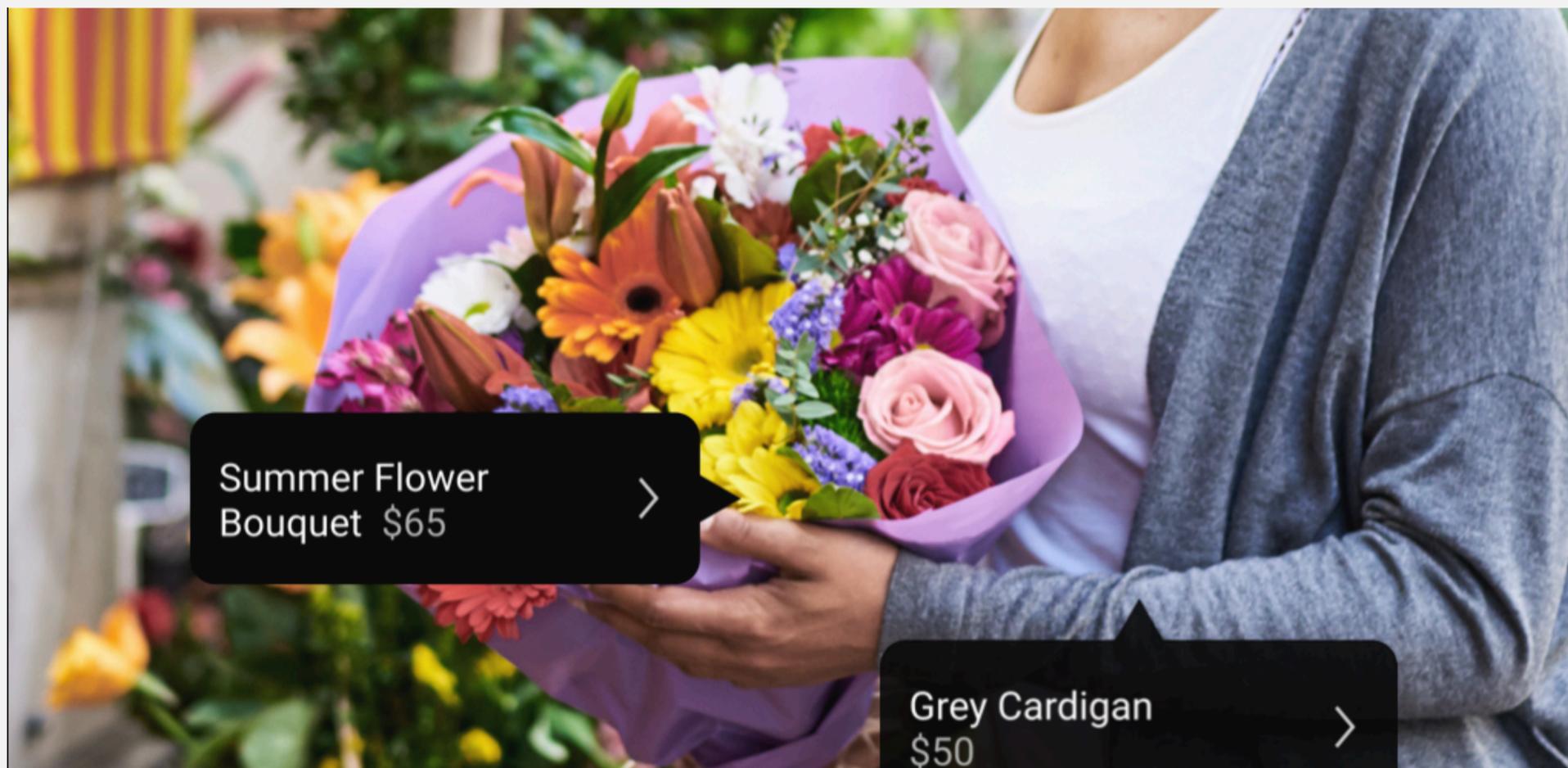
Social is the main lever to warm up audiences and inspire them towards action. That's why, for both platforms and brands, discovery is this year's real focus.



TREND 2

BE EXPLORABLE





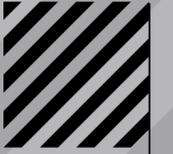
ORGANIC COMMERCE

With the strategic shift to discovery-first, it's important for brands to expand their playing field by increasing the amount of explorable entry points. Features like shoppable tags, native storefronts and product catalogues in the always-on content layer can help. This allows advertisers to stay on brand, while initiating purchase intent.

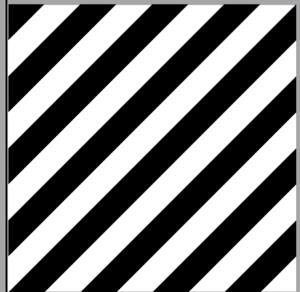
From our test and learning record, we can see an uptick in organically attributed sales as a result of consistent commerce integrations in always-on planning. This doesn't mean paid strategies will become irrelevant.

While organic commerce is an ideal basis for spontaneous shopping, paid media supported commerce will still be the best way to capitalize on deeper intent.

Also, it's crucial to understand who you're talking to, what content to line up and where to play. Around 40% of Gen Z and millennials make an impulse purchase online every 2-3 weeks, rising to 48% among daily TikTok users. Stats like these are an opportunity and a clear direction to prioritize short video and to diversify channel hierarchy.



TREND 3



HAPPY EVER AFTER
IN THE MARKETPLACE

AN UNDISPUTED ROLE

Marketplaces have assumed a new prominence in the D2C journey. Retailers such as Amazon have overtaken brand-owned websites as the final shopping destination. Marketplaces are simply a better match, especially when it comes to user convenience, multi-market ambitions and logistics. If marketers want to win, it's important to integrate these into wider (social) commerce strategies.

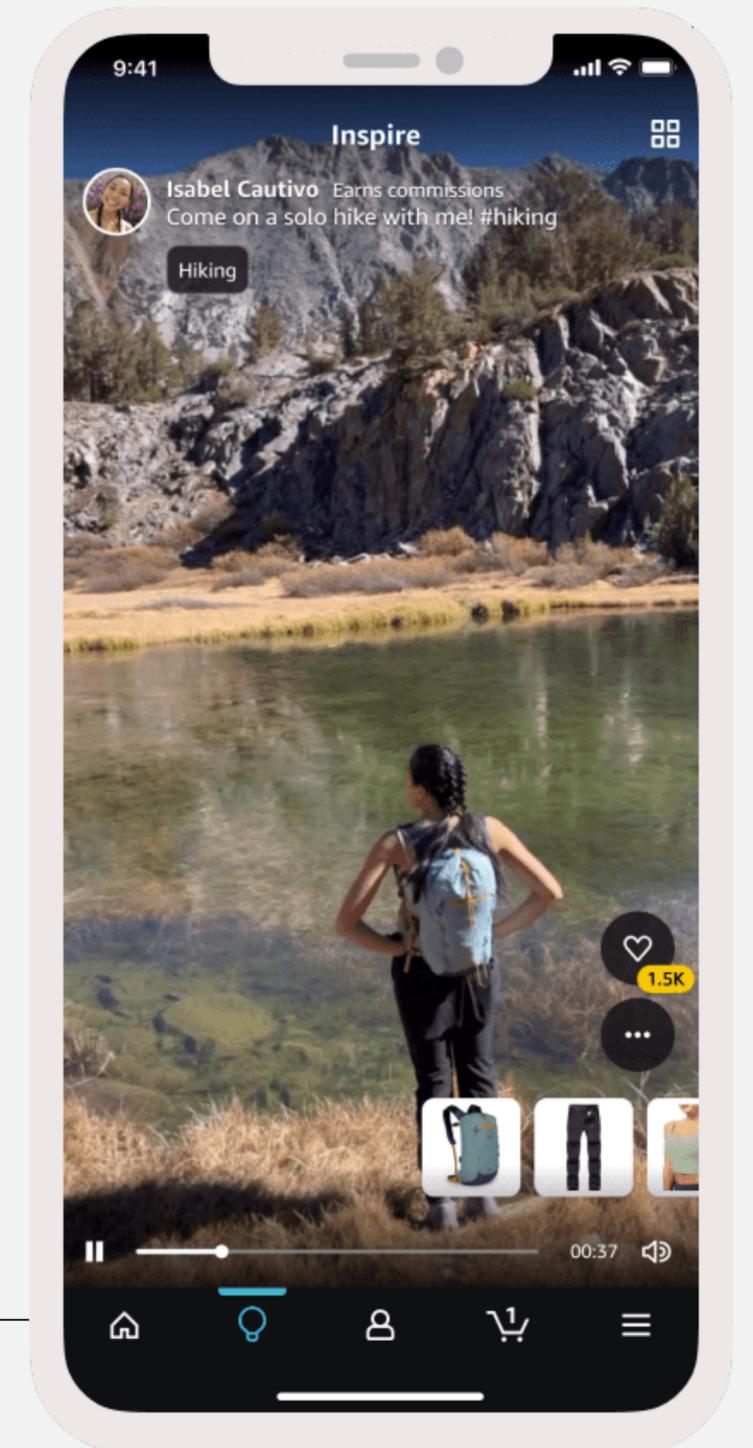
Marketplaces also offer a better guarantee to reroute users back into repeated sales. Permissioned first-party data solutions, like a native checkout, are not coming to life on a global scale so it's currently not possible to create deep consumer profiles through social (only).

Marketplaces can bridge this gap, ensuring in-signed user experiences to build further on the conversion. This matters for longevity, as shoppers tend to repeat their engagement if the experience is personalized.

Thinking and operating beyond social obviously unlocks measurement and attribution challenges. A positive trend we can see is cross-channel developments becoming bigger and more robust.

A few examples: Amazon has its own attribution and analytics solution that can be tied back to commerce activities outside of the platform, while Meta's Collaborative Ads make it easy and seamless to partner up with retailers, without losing track of sales data.

But marketplaces and retail media have bigger ambitions than just being the last stop in the journey. Amazon wants visitors to invest more time, explore the marketplace and shop serendipitously. The in-app **Inspire** feature (seemingly influenced by TikTok), is a clear step forward to keep users locked in.

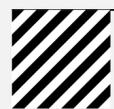
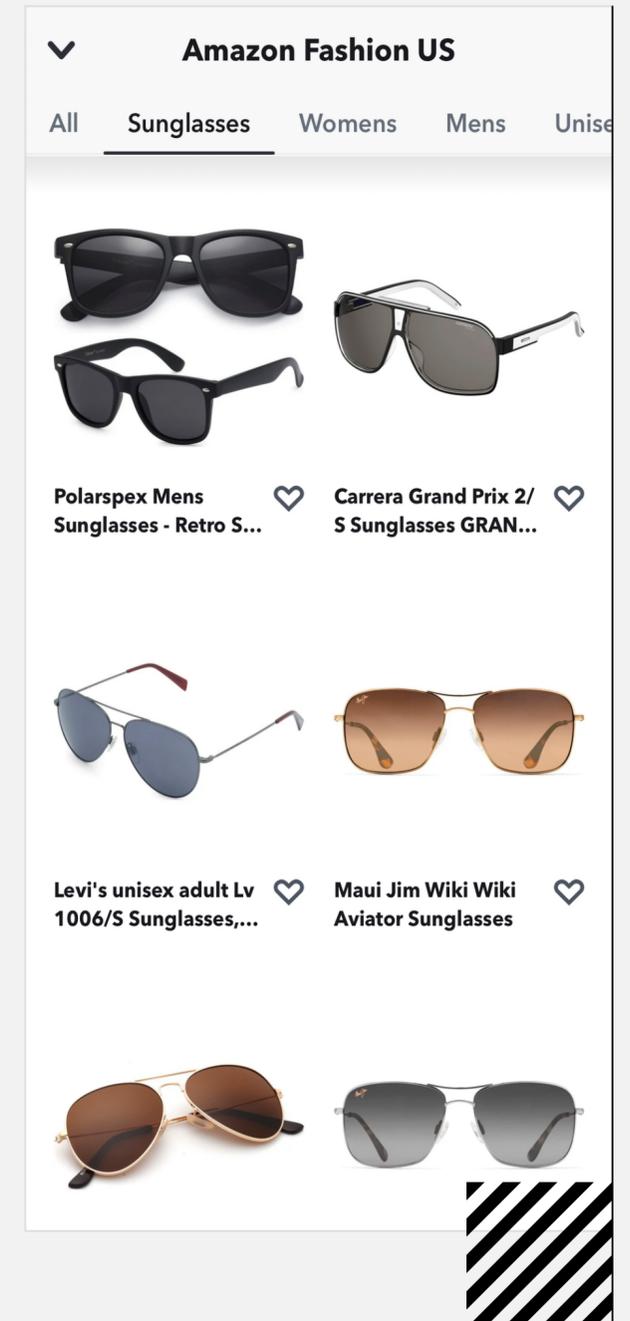
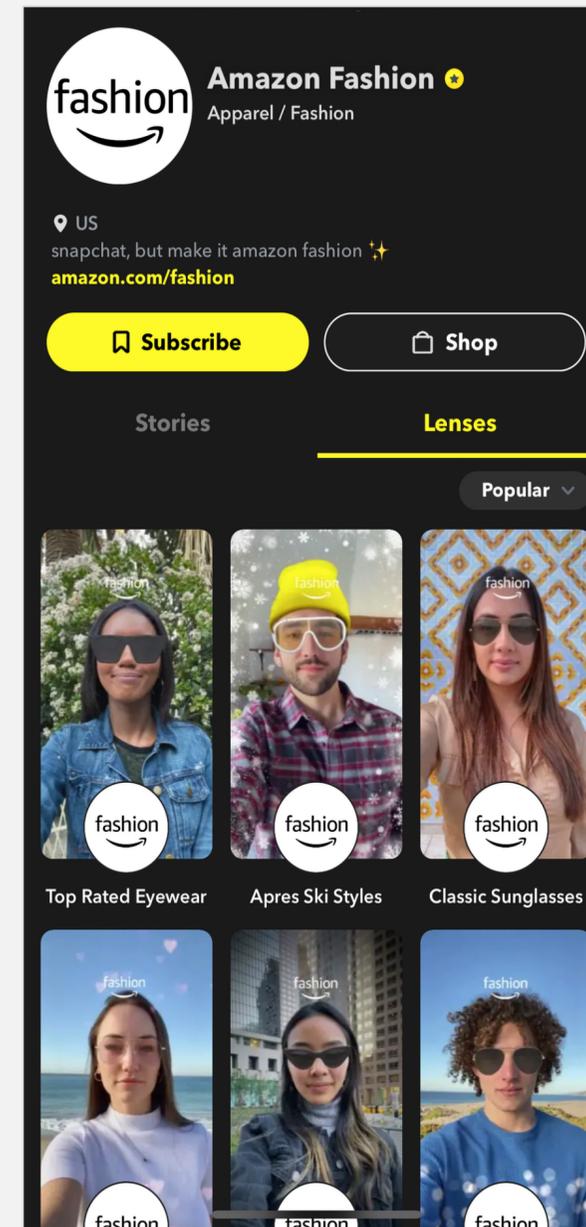


CROSSING ALL OVER

Another great evolution in the connected commerce sphere are crossovers between networks and marketplaces.

For instance, Snap made it possible for users to try on AR-led products before checking out directly on Amazon - offering the possibility to showcase other similar products, while getting a better understanding of the shopper's interests.

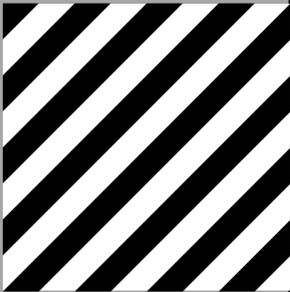
Also, the (self-proclaimed) camera company is working with a selection of brands to experiment with AR and speech recognition tech for engaging product and gifting recommendations.





TREND 4

DON'T BOMB
THE CARPET



BRAND & COMMERCE INTERPLAY

It's becoming more obvious that connected commerce should not be driven with a strictly performance mindset.

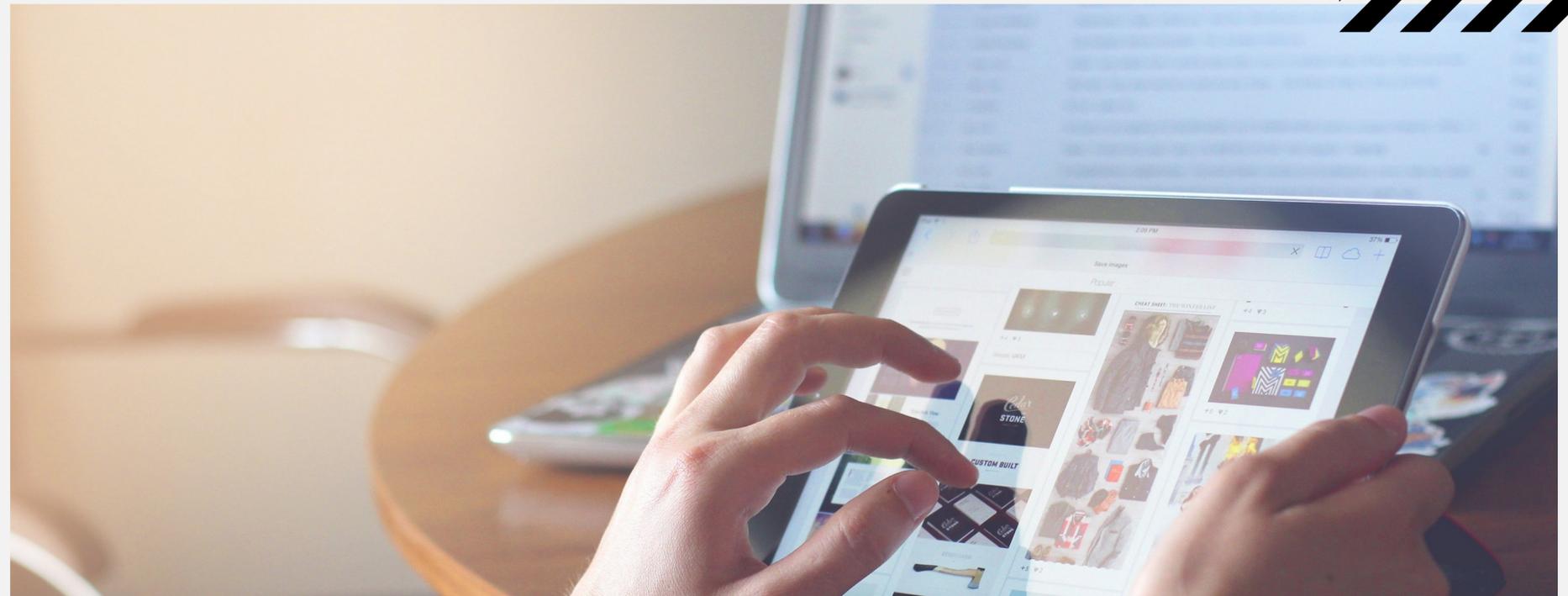
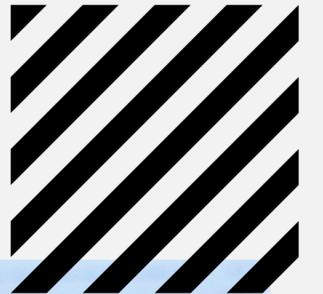
With an overabundance of choices and channels, and a consumer who is harder to persuade, there's a risk of plateauing sales within a short timeframe and marginal gains over time.

A balanced approach of longer-term, upper-funnel and discovery-first thinking can take brands to the next level, as against simply carpet-bombing the same audience with re-targeted product ads. One of the main arguments here is around continuously creating demand and pulling up qualitative reach, as a precursor for attention.

From our experience, we notice that a performance-oriented strategy (with a bare minimum of brandplay) is more likely to lead to a short burst in sales, but will likely cause a fall-off in searches and brand resonance over time.

Looking at platform research, there are significant correlations between building meaningful scale, maintaining equity and driving incremental commerce value.

To avoid sluggish growth of both brand and sales objectives in the long run, it will be essential to keep growing by speaking to a pool of potential new customers through qualitative reach campaigns and enhancement strategies.



ATTENTION AS A KEY METRIC

Let's look at this from a concrete angle. Your brand's ideal target has a proliferation of choices and expectations (from trials, to free delivery, to discounts). This means that showing up in as diversified a way as possible is essential to capturing attention.

As part of our continuous test and learn trajectory we analyze the impact of brand building on sales, and identify the parameters that trigger commercial uplifts (or considerable declines).

A recurring observation is how a strictly product focus (and thus a no-thrills content experience) can lead to a decrease of brand KPIs. Going deeper into marketing mix modelling studies, we notice that the ROI of our campaigns is usually driven by innovative and immersive formats that capitalize on experience.

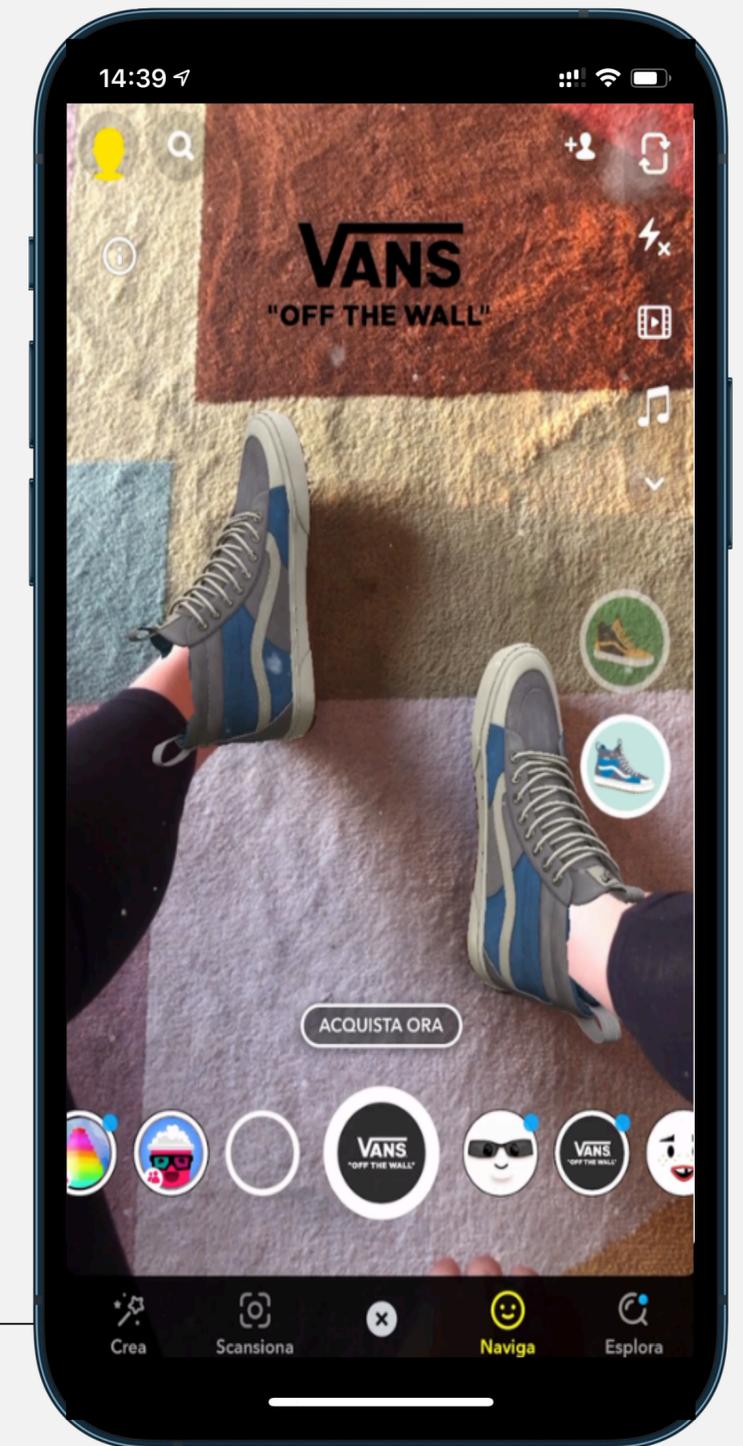
As highlighted in the other sections of this report, an AR try-on filter or a Twitch livestream aren't just about being hip to the game. Leveraging those formats and placements offer valuable ammo in the war for the users' attention.

70%

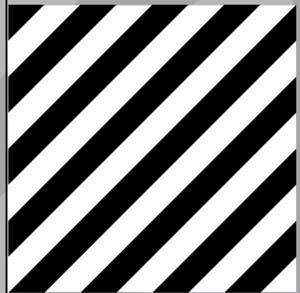
Focusing on branded experiences rather than traditional social media advertising increased ROI by 70%

x10

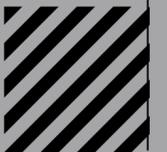
AR formats are 10 times less expensive to generate 1 hour of post click experiences with brand content compared to traditional video formats



TREND 5



ICOMMERCE:
WE SELL OR ELSE





An example of this diversified enhancement approach is prioritizing influencer commerce (iCommerce) in the channel mix. As platforms evolve and it's easier to shop and scroll, the funnel as we know it will change drastically, driven mostly by creators.

From performance-based partnerships to affiliates supporting attribution models in the quest for influence ROI, 2023 is set to become the year of iCommerce. Last year, 80% of consumers made a purchase based on an influencer recommendation and TikTok's commerce-focused trending hashtag, #TikTokMadeMeBuyIt, has billions of views.

Commerce will remain a huge priority for the platform. It's selling products while creating an emotional connection through unique storytelling and a personalized experience. In line with the increasing relevance of discovery, influencer commerce meets audiences where they are and how they want to purchase, making it one of the most effective ways to sell.



01 The emphasis for social in a wider connected commerce context is concentrated on discovery.

02 With limited attention and decision paralysis, being explorable is key. Brands should embrace organic commerce and ways to soak up users' dwell time.

03 From a data POV, marketplaces are the ideal destination to close the loop. But, also for discovery and consideration marketplaces gain relevance.

04 Brandplay and commerce need to stay interconnected. Most commerce features on relevant social platforms allow for this.

05 Influencer-led commerce is bubbling up and on its way to become a top pick equity and sales driver.

CONNECTED COMMERCE SUMMARY



STARTING POINT

With a global market share at \$16.4BN in 2022, influencer marketing is very much here to stay. A constantly shape-shifting channel which demands a lab mentality from brands. With every new platform, a new branch of influencer marketing is formed with unique ways to engage and reach niche audiences.

TikTok alone has revolutionized the concept but other platforms may grow their influencer potential this year.

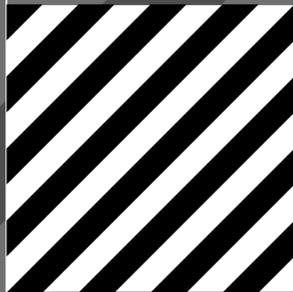
It's not just about the new kids on the block though, fresh features added to existing platforms also pave the way for new types of influencer engagement and content.

Facebook Groups, for example, has made community engagement top of mind for this channel. Different markets also unlock interesting ways to make use of platform functionalities. So, where does it go from here?

This section features elements and references of Ogilvy's Influence Trends You Should Care About 2023



TREND 1



A REVAMPED
PLAYING FIELD



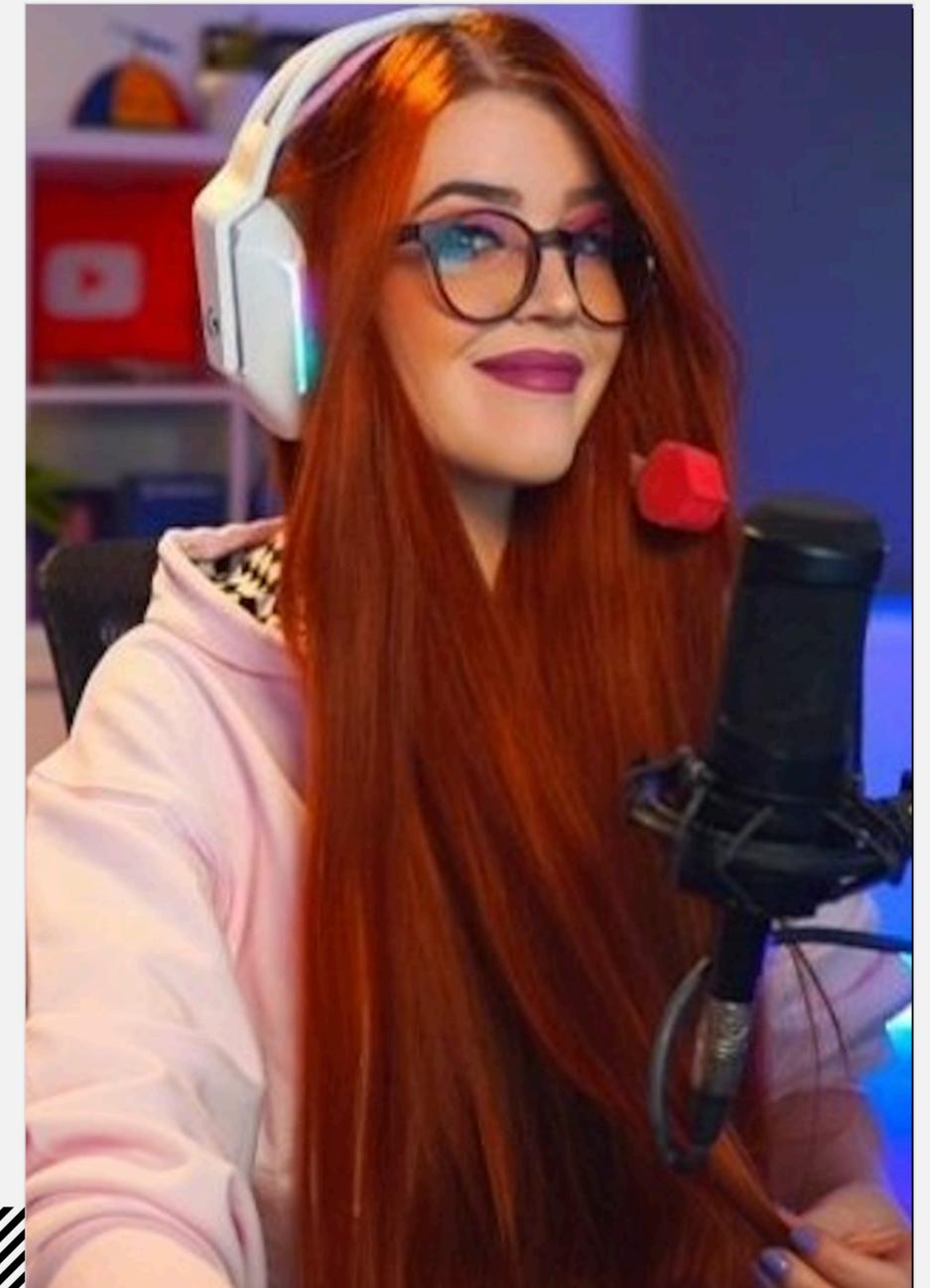
TikTok will remain the key area of focus and growth for influencers/creators. The rippling effects of this for brands has been explored in the above lenses but how is this affecting Influencers and Influencer marketing?

Influencers have been forced to swim or get drowned out. In the early days of influencers marketing we predominantly saw influencers create content around make-up tutorials or hair-care. Fast-forward to 2023, and it wouldn't be strange to see an influencer doing a make-up tutorial while discussing a harrowing true-crime documentary. The playing field became more multifaceted.

Audiences have also evolved from the days of the pretty mirages of Instagram and now either want to be educated, entertained (preferably both). The combination of TikTok as the platform powerhouse and Gen Z audiences have made authenticity non-negotiable and personality a must.

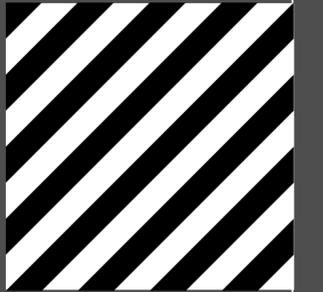
The COVID-19 aftermath has also exacerbated this with audiences open to learning new skills or interested in trying different things, opening the doors for influencers with niche interests to flourish such as architecture, urban gardening and even renaissance art. This triggered influencers who have niche interests to reach, teach and engage diverse communities around a single topic.

Gaming was one of the first categories of influence to truly capitalise on a skillset. Emerging community and influencer-sourced hashtags such as **#BookTok** have completely changed the literary scene and we foresee more industries to get a similar boost.



TREND 2

THE DAWN
OF THE CREATOR





Creators often have no set personal relationship with their audience and haven't spent years meticulously building their communities with personal anecdotes and raw authenticity. Instead, they've built followings based on a particular narrow skillset or content style which means audiences are no longer content with aspirational, well-lit mirages of reality.

Creator-orientated content became hugely popular in 2022, with more brands partnering with storytellers and visionaries to inject new energy into their public personas. This will grow further in 2023.

Creators are specialists in their own right, often armed with editing skills, graphic conceptualization and storyboarding proficiencies which can rival that of agency creatives.

Collaborating with creators requires freedom and trust, and involvement from the conceptual phase of a campaign. Strong narratives are key. If you want your content to stand out, keep it in line with the creator's narrative style, with witty and clear connections to the brand.

This is also an opportunity for brands to make memorable, stand-alone content which endures after the campaign has ended.



HOW BEST TO WORK WITH CREATORS?

- This type of collaboration requires creative freedom and trust. Involve creators from the conceptual phase of a campaign to get the most authentic and inspired results.
- Strong narratives are key. If you want your content to stand out, keep it in line with the creator's narrative style, with witty yet clear connections to the brand.
- This is also an opportunity for brands to partner with creators to make memorable content that can exist outside of their channels (as stand-alone content that can endure long after the campaign has ended and the report has been submitted).

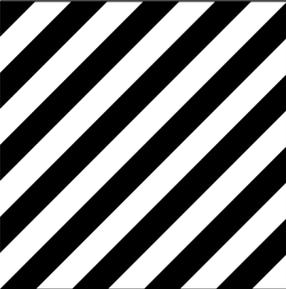
This dawn of the creator coincides with a slightly more obvious sub-trend of increasing video formats. TikTok continues to lead the charge, but Instagram (Meta) Reels, not to be outdone, are generating 67% more engagement than standard Instagram videos.

All in all, creators offer opportunities for brands to generate fun, original content in ways many traditional influencers simply can't. And with a clear movement to increase video usage, this trend is likely to expand.





TREND 3



INSTITUTIONALLY
SPEAKING

GO INTO THE POLITICAL ‘NO-GO’

Until very recently, political commentary was considered taboo in the influencer marketing sphere. This has changed dramatically with the rise of climate change activism, the BLM movement, #MeToo and other highly politicized, organic social campaigns.

If influencers opt out of these conversations, Gen Z audiences see that as complicity and a betrayal of their trust. The same applies to brands using these influencers. This trend will only increase in 2023.

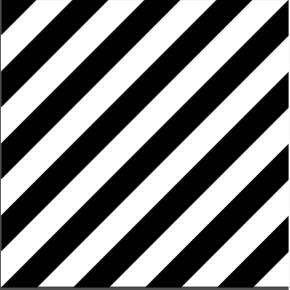
Brands or governmental organisations should use this space to communicate with audiences who are marginalized and forgotten by mainstream media using a micro-influence approach because people in different socio-economic and ethnic backgrounds, have different experiences in relation to political institutions and messaging cannot be one size fits all.

The key to successful institutional-based campaigns is steering away from outwardly polemic views, instead raising awareness around topics (e.g. suggest that people should vote, instead of telling people who to vote for).

It’s also vital to collaborate with influencers who are credible – they have either a demonstrable interest in socially conscious issues or are sincere in their convictions.

And, in this volatile space, be open to the criticism and questions that will arise from campaign content and make sure influencers are briefed effectively on how to respond.





TREND 4

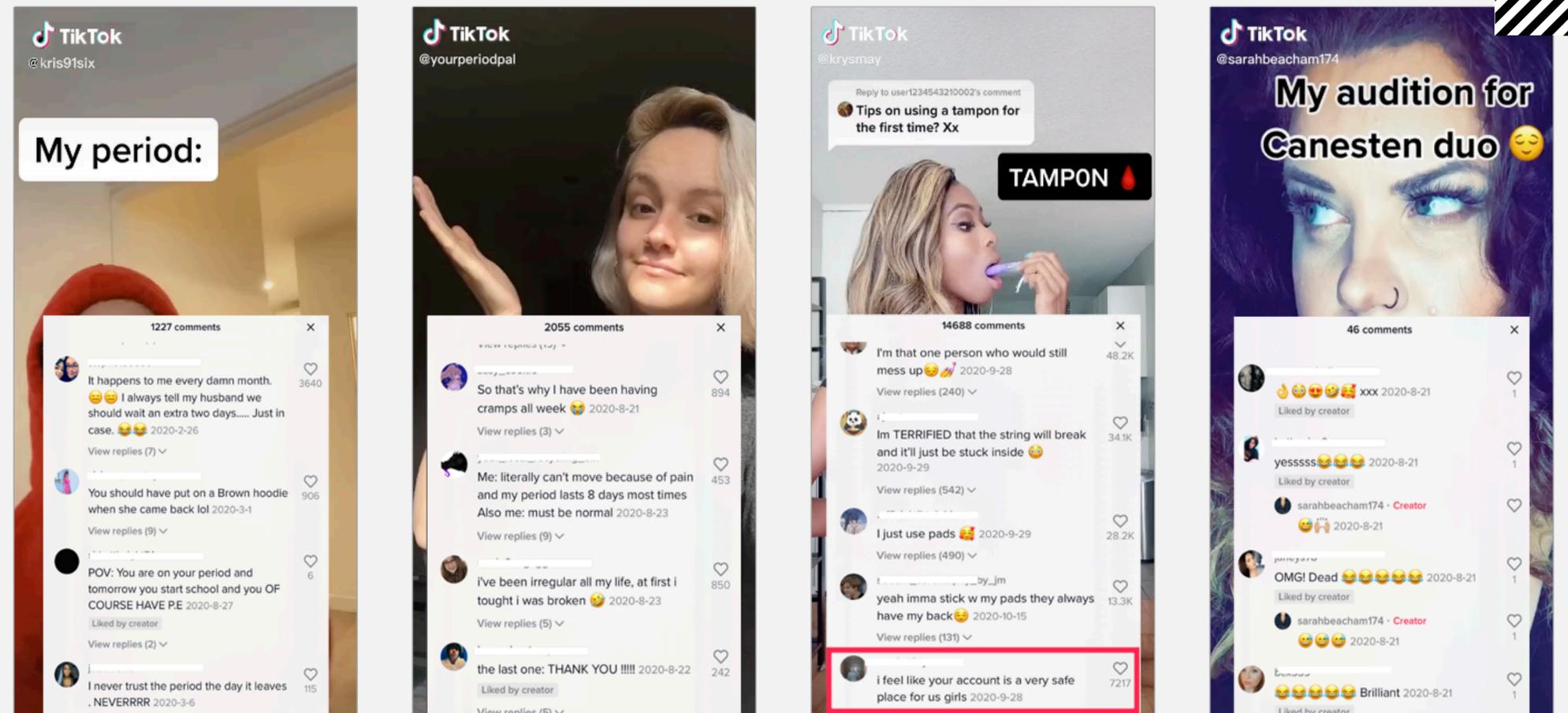
HEALTH AND
WELLNESS

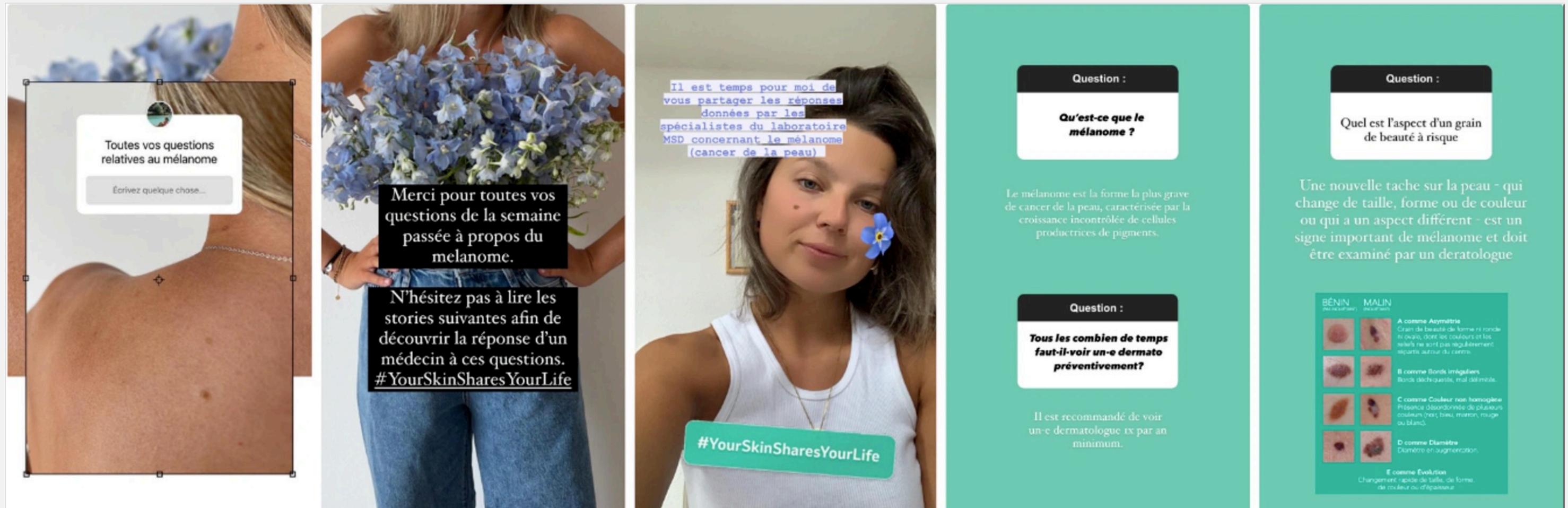
According to a 2021 Deloitte study, trust is the main deficit in the pharma industry. In 2023 we expect more pharma brands to attempt to rebuild that trust by collaborating with influencers/creators in the spreading of messages around diseases and medical issues, veering away from any product related information.

#MedicalTikTok is home to millions of short-form health-related videos, created by both HCPs and patients with little brand involvement. They share knowledge and personal journeys, forming powerful and emotive communities.

The same regulations for brands in the industry do not apply to individual users on these platforms, so we also see Health Care Professionals (HCPs) contradicting each other and unethical patient information being shared. Another concern is that Gen Z is increasingly using social media as a search tool (more on this in Lens 1) which can lead to inappropriate or inaccurate information. So this is the most opportune time for pharma companies to make their voice heard in these spaces.

Influencers are an effective and efficient vehicle to normalize important health conversations that may be uncomfortable to discuss, especially in certain religious or cultural communities. Merging educational and fact-based information with empathy and kindness can also help, especially when dealing with sensitive topics such as HIV.





MELANOMA IGC CAMPAIGN

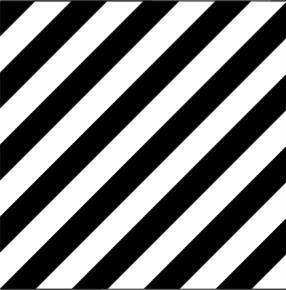
Ogilvy Social.Lab and MSD Belgium set out to raise awareness on melanoma with #YourSkinSharesYourLife. Based on the insight that the pandemic had led to a decrease in consideration of other diseases and the need for preventative measures, this multi-channel campaign aimed to bring back people's attention to skin care, teaching them how to identify unusual looking spots, while reinforcing

the behavior of getting one's skin checked regularly. As well as driving the targeted audience to a dedicated website to learn more. #YourSkinSharesYourLife partnered with 10 influencers who encouraged users to ask questions via the question sticker. In a unique partnership with medical practitioners, influencers were giving answers to their followers.



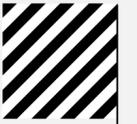


TREND 5



BAND
TOGETHER

GOING BEYOND THE SINGULAR



The power of ‘collective influence’ for brands will increase this year. In the past, collaboration between influencers was frowned upon by many consumers as creating inauthentic friendships in order to boost followers. However, with the rise of Gen Z’s firm and authentic tone of voice, this practice is now rising and increasingly unprompted.

Functionalities on TikTok such as stitch and duet now allow audiences and influencers to collaborate seamlessly. Collaboration breeds diversity, reach and creative effectiveness, as the focus is no longer on extending reach, but creating content that is profound and unique. Influencers are spontaneously co-creating songs, having conversations, and as a result of these authentic engagements, audiences are prompted to participate,

This is a phenomenon also seen outside of TikTok. The gaming sector has perfected the art of collective influence by creating teams based on geographic location and then having these teams compete. We also see this as a common practice with YouTubers who often cross-pollinate their channels on the conversation-charged platform.





01 TikTok remains the key area of focus and growth for creators. Twitch LinkedIn, Bigo Live and Discord should gain strength.

02 From a terminology and value POV, creators are the new influencers.

03 Politics & difficult social issues are not off limits.

04 Health and wellness companies will use influencers to (re)build trust.

05 The power of 'collective influence' for brands will increase.

INFLUENCE & CREATORS SUMMARY



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Disclaimer

The online references are listed per lens, although, there's some overlap between the different chapters. Aside from online source we dug into proprietary insights, conducted internal brainstorm sessions and scanned trade publications. Please note that some stats or numbers can be different over time. Also, some platform features or formats might be discontinued or rebranded. In case there are any questions about the content of this report that can't be tracked back in the references, please get in touch.

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CREDITS



Edited by

Dimitri Cologne

Contributors

Arnaud Vanhemelryck
Awie Erasmus
Brad Page
Catherine Sackville-Scott
Chris Walts
François Faggianelli
Jordan Pieters
Mateusz Wanat
Mathieu De Moor
Mathieu Gillain
Nurya Doorenbos
Pierre Quievreux
Tolga Buyukdoganay
Yannec Vermeeren

Creative team

Jack Tanner
Mike Wills
Salvatore Vullo
Xavier Vanderplancke

Executive sponsors

Rob Hill
Yves Baudechon



The image features a central red square containing the word "Ogilvy" in a white, serif font. This central element is surrounded by a grid of squares with various patterns and colors. The patterns include solid black, solid white, solid light pink, solid dark grey, and diagonal stripes in black and white, as well as red and white. The overall composition is a modern, geometric design.

Ogilvy