

By broadcasts from tomorrow

THE FUTURE OF SOCIAL MEDIA

DAZED STUDIO

INTRODUCTION

SOCIAL MEDIA HAS TRANSFORMED YOUTH CULTURE. ITS IMPACT & INFLUENCE ARE TREMENDOUS.

WE'RE NOW AT A TURNING POINT. A NEW FOUND CONSCIOUSNESS IS EMERGING.

THE EVER-INCREASING DIGITISATION OF OUR LIVES IS RAISING QUESTIONS: WHO IS IN CONTROL OF OUR MEDIA CONSUMPTION? HOW MUCH DO WE REALLY KNOW ABOUT ITS IMPACT ON OUR RELATIONSHIPS AND WELLBEING?

THIS REPORT IS AN EXPLORATION OF HOW SOCIAL MEDIA PLATFORMS HAVE EVOLVED AND WHERE THEY'RE HEADED.

OUR NEXT REPORT WILL EXPLORE THE FUTURE OF YOUTH CULTURE, INCLUDING CREATORS AND THEIR ROLE IN CULTURE.

“It’s seemingly as hard to give up on social media as it was to give up smoking en masse.. Quitting that habit took decades of regulatory intervention, public-relations campaigning, social shaming, and aesthetic shifts. At a cultural level, we didn’t stop smoking just because the habit was unpleasant or uncool or even because it might kill us. We did so slowly and over time, by forcing social life to suffocate the practice. That process must now begin in earnest for social media.”

Ian Bogust, *The Atlantic*, 2022

TODAY

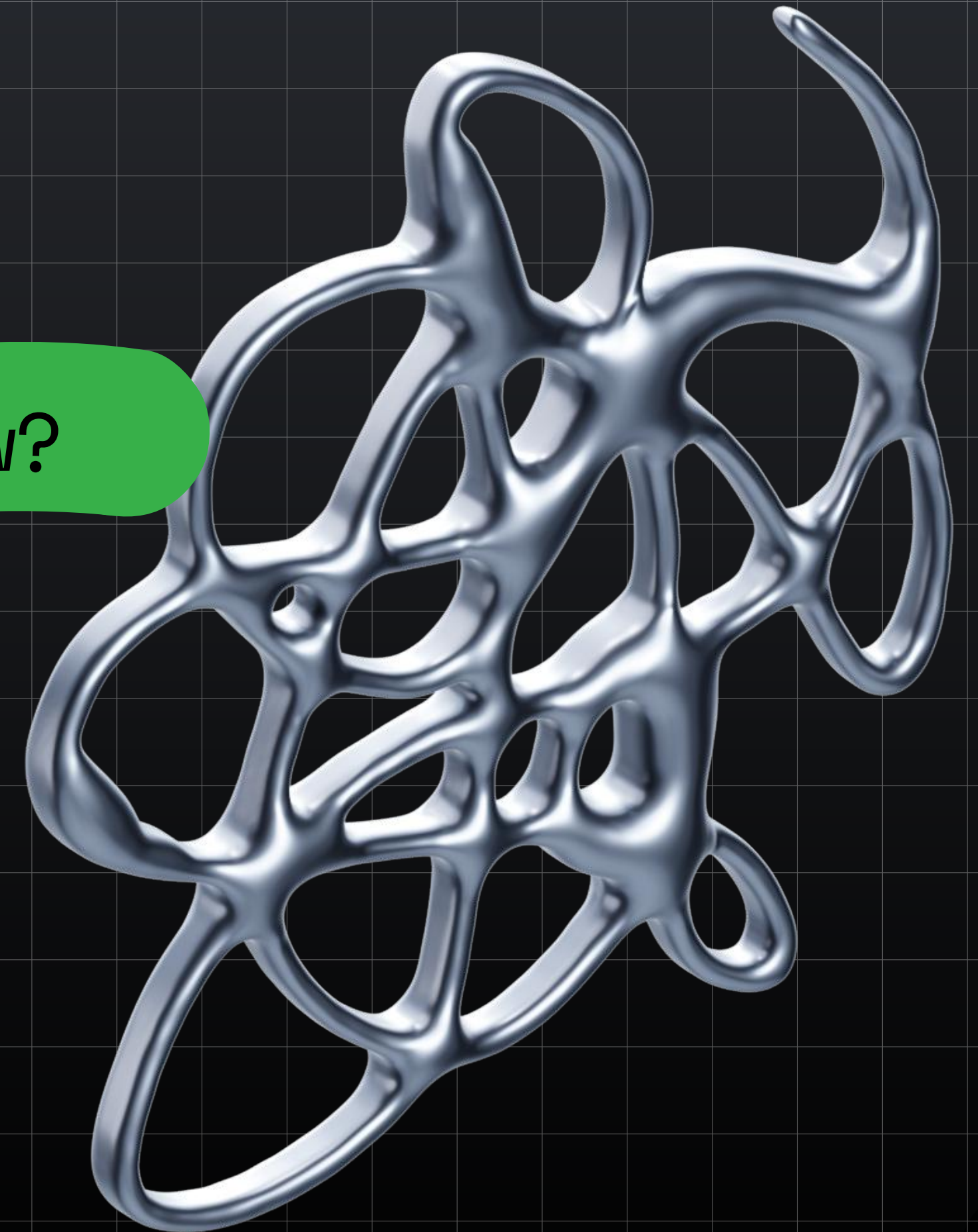
> Why social media? Why now?

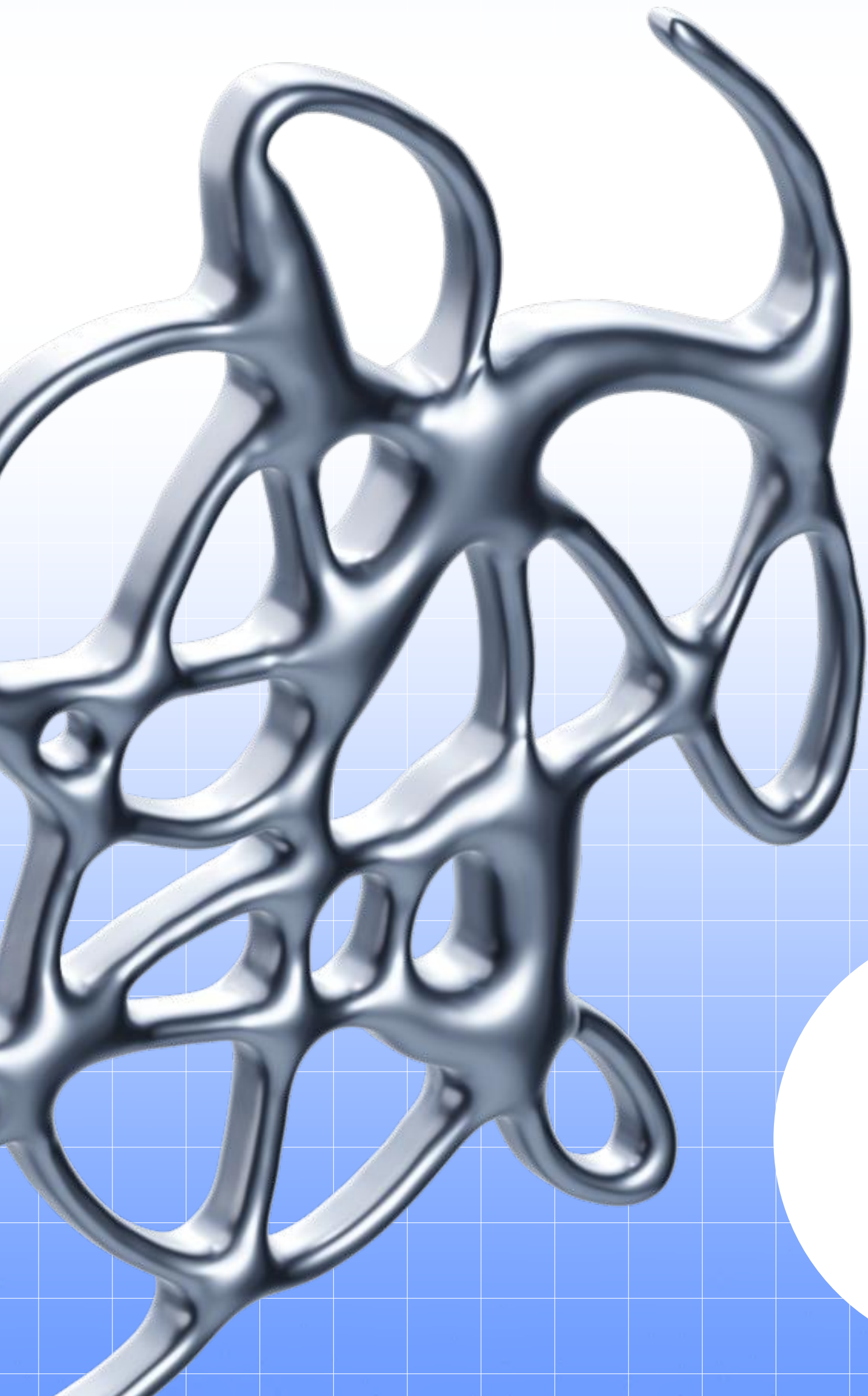
> Back to basics

> How are young people using social media now?

> What's next?

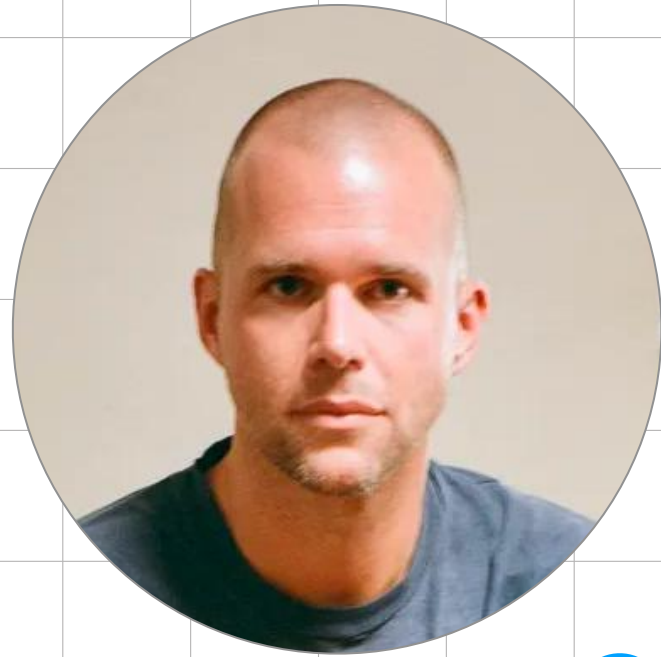
> What does this mean for brands?



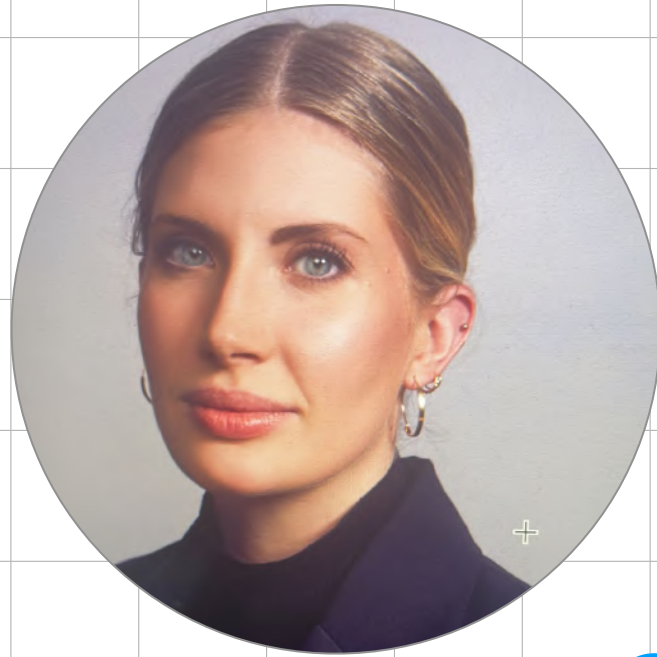


METHODOLOGY

Methodology



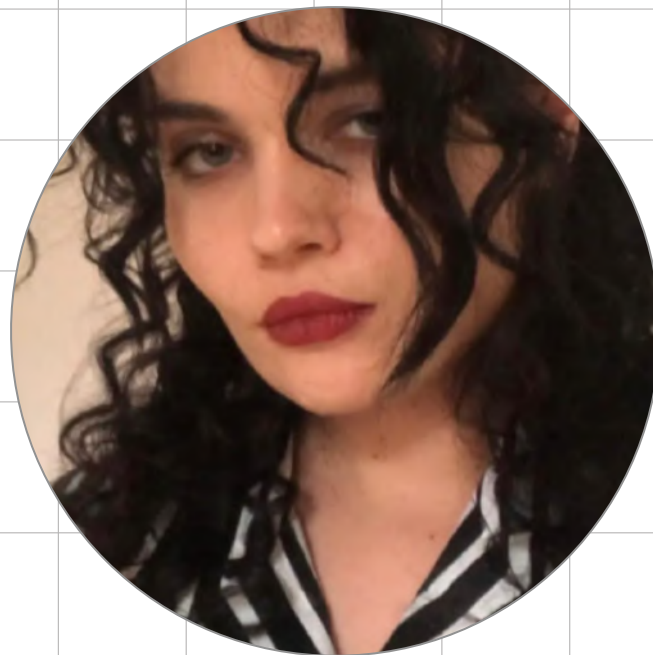
Chris Black
Founder of Done
to Death Projects



Gabrielle Kaegler
Brand Consultant



Alexandria Williams
Creative Strategy
Director Beauty at
Global Tech Company



Hatti Rex
Head of Social
Dazed Media



ESEA Sisters
East and South East
Asian women, trans, non-
binary and genderqueer
community

SURVEY

600 GLOBAL
RESPONDENTS AGED
18-24

AUDIENCE VOICES

INTERVIEWS WITH
7x GLOBAL GEN Z
DAZED READERS

EXPERT VOICES

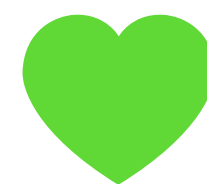
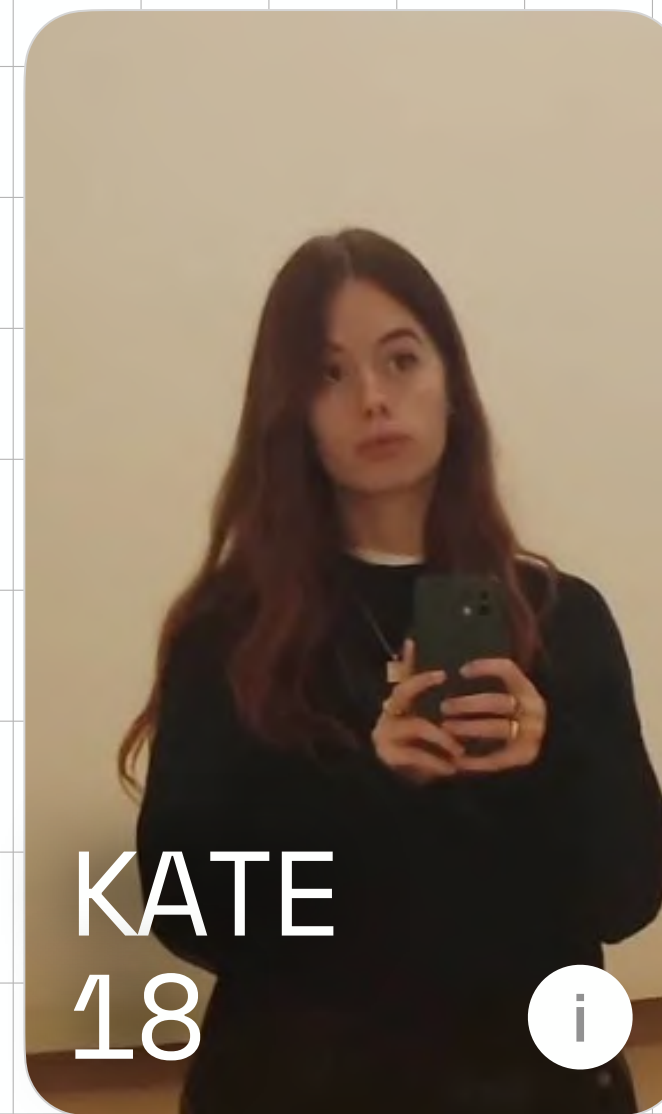
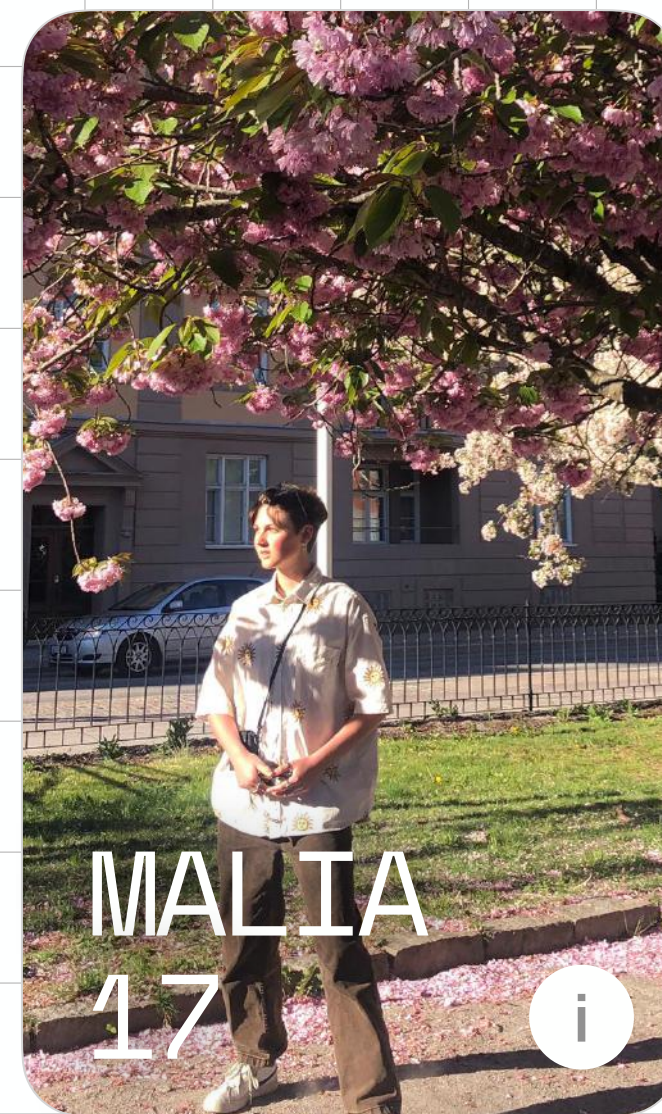
5 IN-DEPTH
CONSULTATIONS WITH
A PANEL OF EXPERTS


DESK RESEARCH

BROAD CONTEXTUAL
AND INSIGHTS
DRIVEN RESEARCH
(SEE BIBLIOGRAPHY)

Methodology

AUDIENCE VOICES

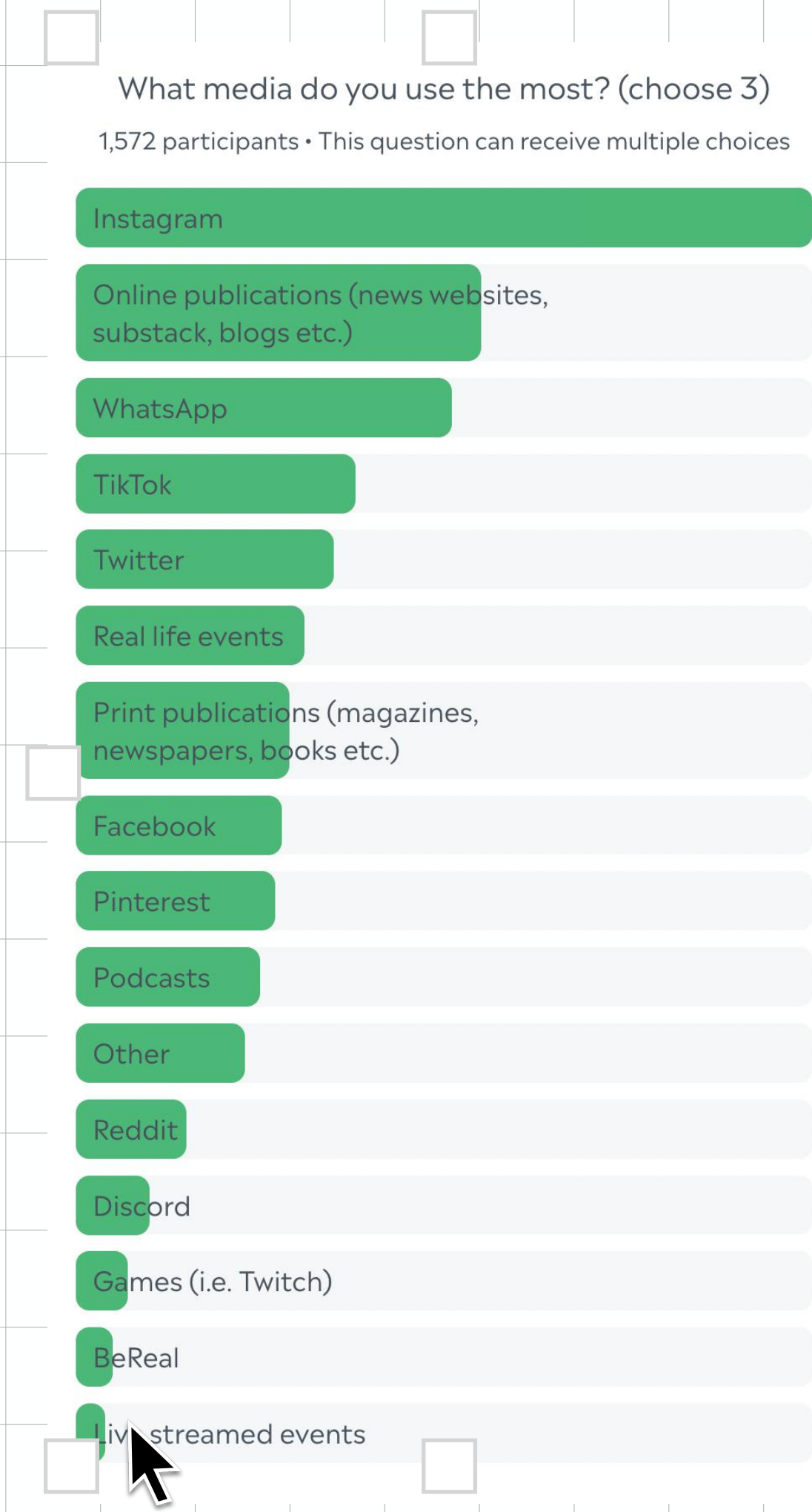
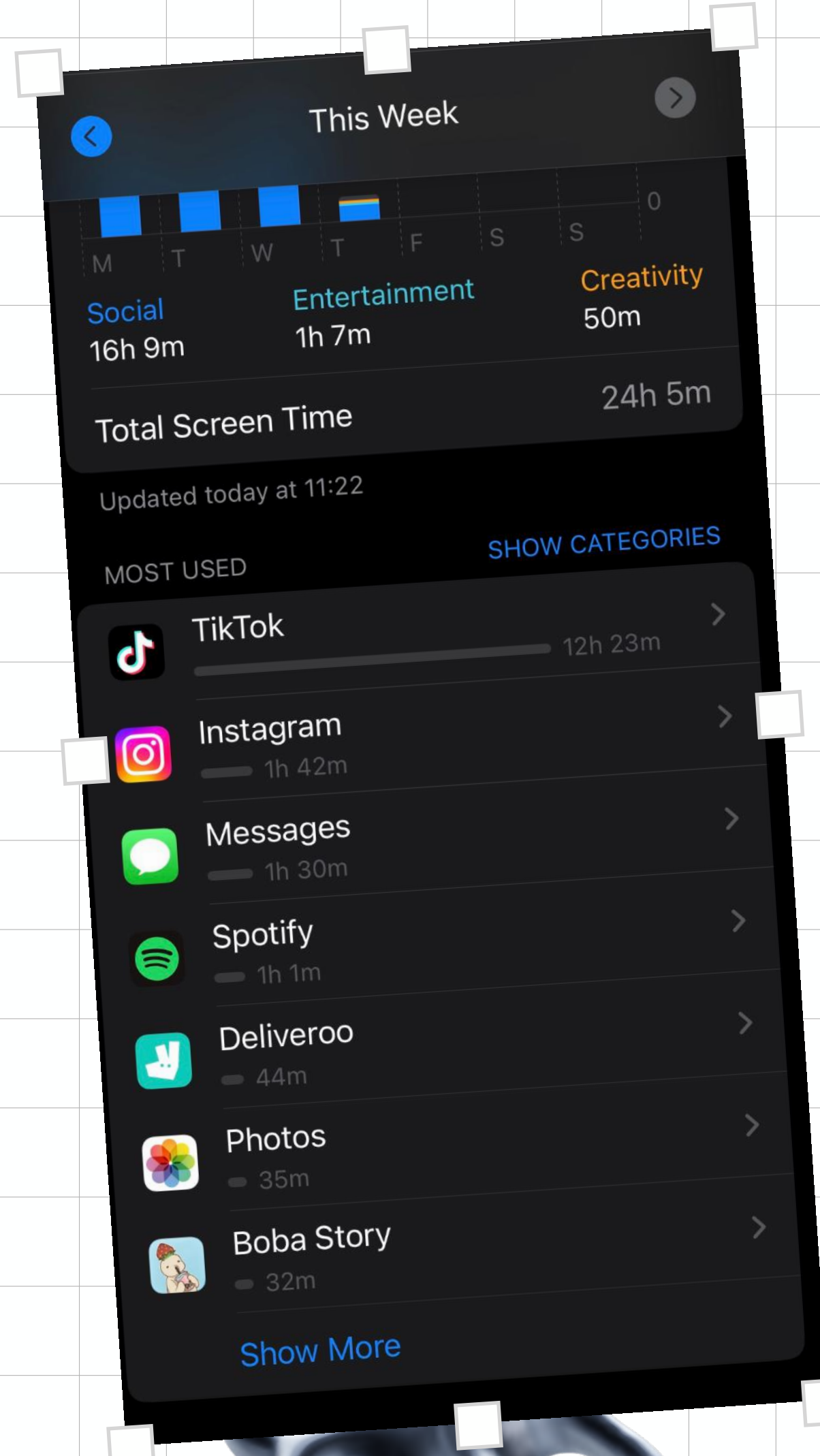
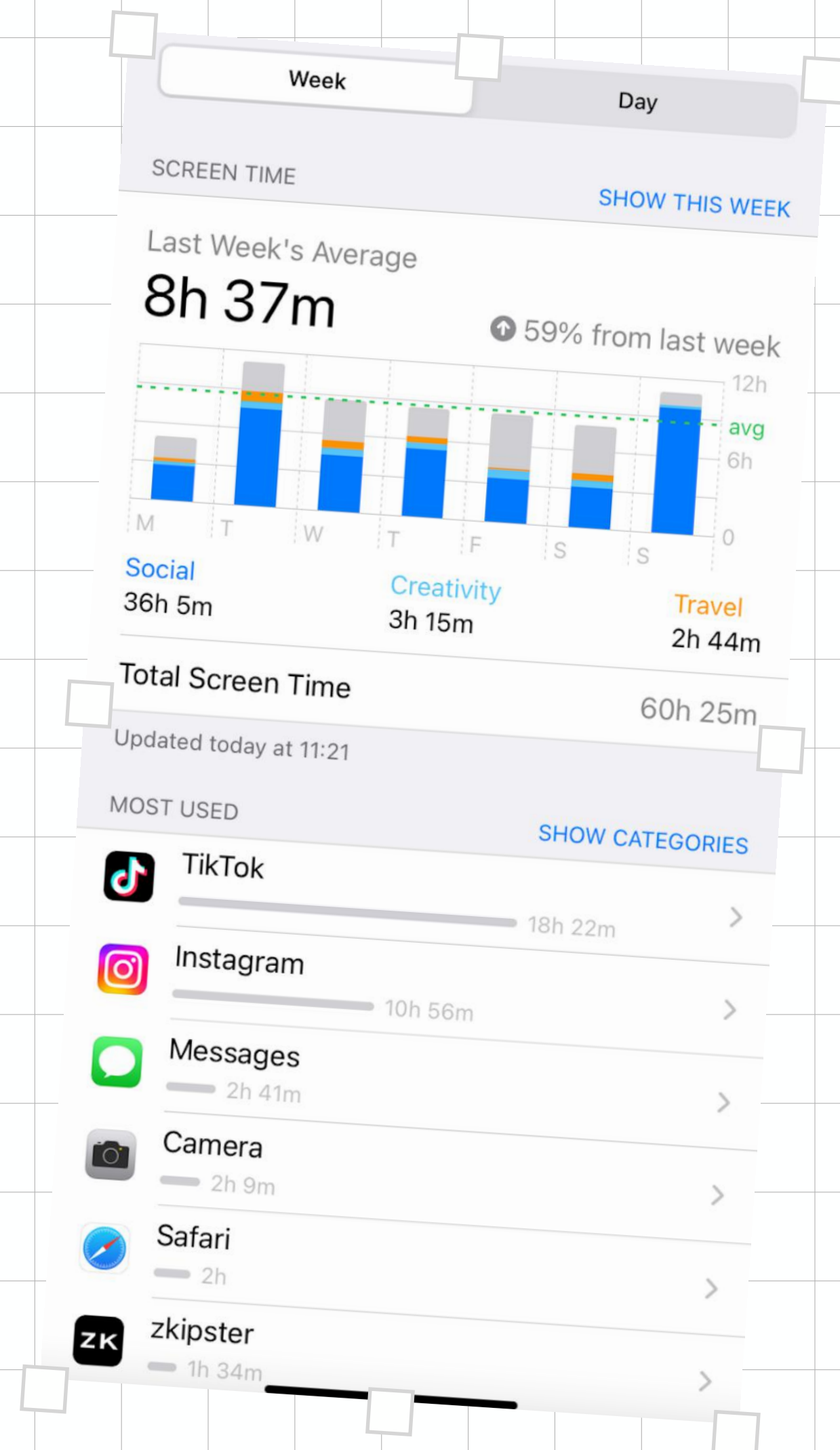




WHY SOCIAL MEDIA?

WHY NOW?

SOCIAL MEDIA IS ONE OF THE MOST INFLUENTIAL FORCES WITHIN YOUTH CULTURE





Gen Z are reportedly using every social media app less

In the last few years, young people's mindset and behaviours have shifted, changing the overall social media landscape. People are becoming more aware and critical of how large social platforms are exploiting them.

Data published by Pew Research Center shows that users between 18 and 25 years old are the only age group to see a decrease in social media use since 2019, while a recent consumer survey by Piper Sandler showed that Generation Z reported less use of every social app, except for TikTok.

except for TikTok.



THE GOLDEN AGE OF SOCIAL MEDIA IS OVER

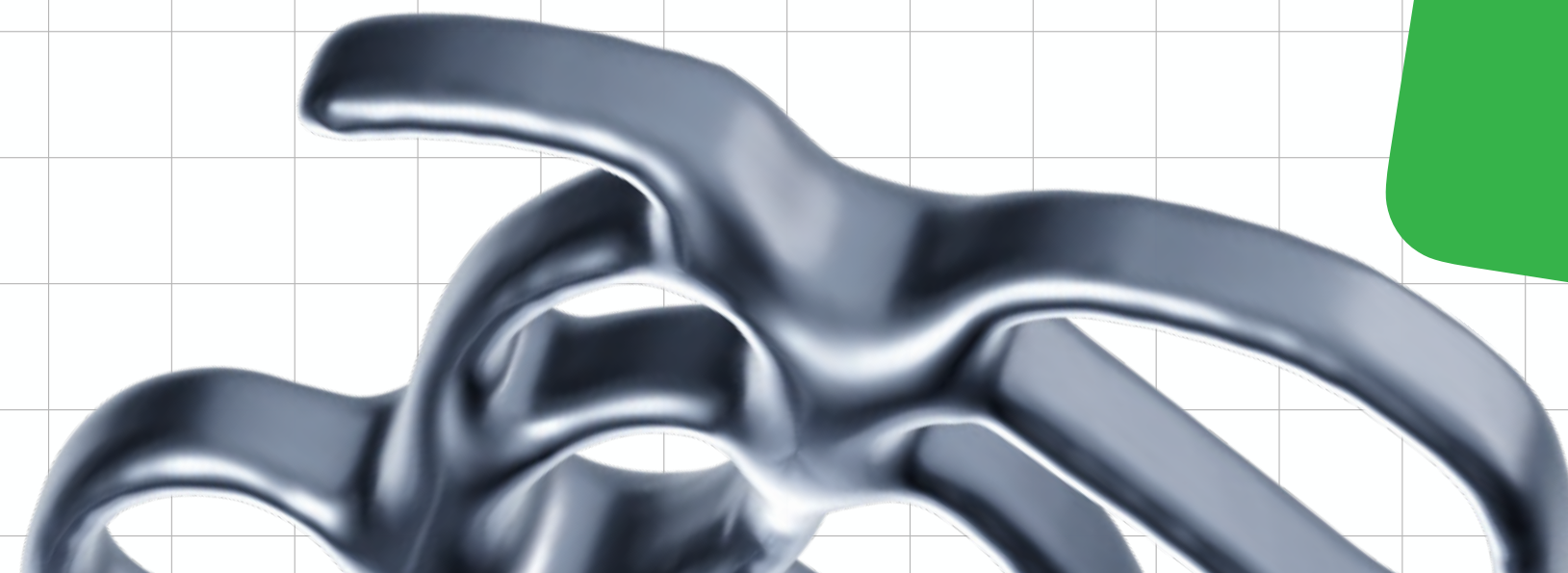


1. New
Youth
Priorities

2. Big Tech in
Trouble

3.
Political
Instability

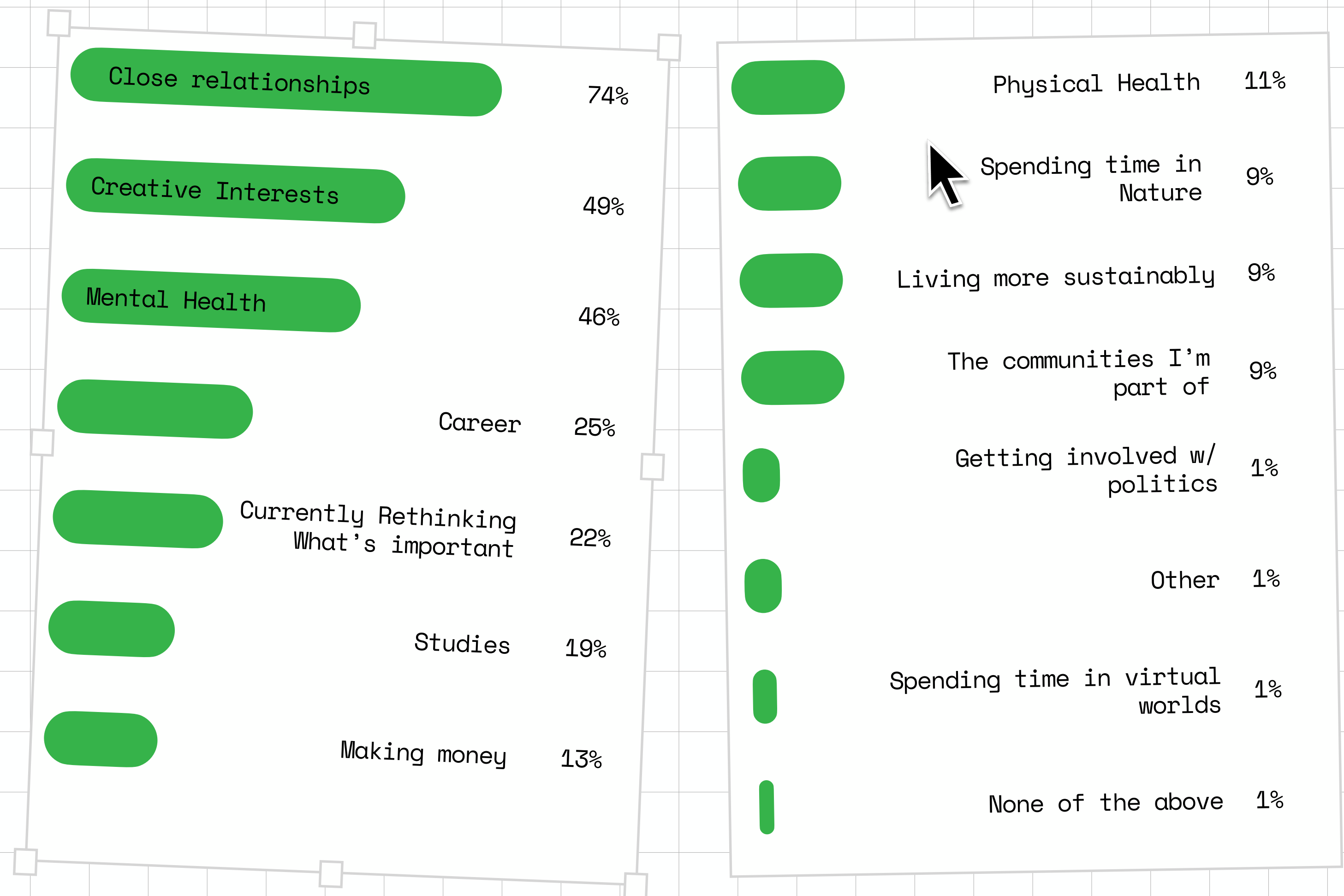
CULTURAL DRIVERS



1. Youth are prioritising personal wellbeing and real, intimate connections

Since at least 2021, Dazed's Gen Z audience has been telling us that they are prioritising their physical and emotional health.

Dazed Media Research
2021-2023



X

2. They are questioning the value & integrity of social media

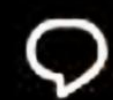
“Apple avoided layoffs because the CEO took a 50 million dollar pay cut, the rest of these companies are laying off thousands of people because the Metaverse and all that s*** isn't real. They hire all these people, they did all this s***. It didn't work. And no one can admit that. Obviously they're gonna make excuses and, you know, Covid this, recession that, it's all this b*****.”

- Chris Black, Founder of Done to Death Projects

Big Tech companies have axed at least 250K jobs in the last 12 months, 85K in January (Forbes, 2023) Mark Zuckerberg is pivoting away from the Metaverse and onto his next big thing: AI (Bloomberg, 2023)

“I used to post stories a lot but now I think, ‘What is this for? Why am I doing this?’ I think people are questioning the reason why they need validation. People are posting for other people and not themselves.”

- Kessler, 23



3. As are political powers



U.S HOUSE PANEL APPROVES RTII



U.S HOUSE PANEL APPROVES B
AN




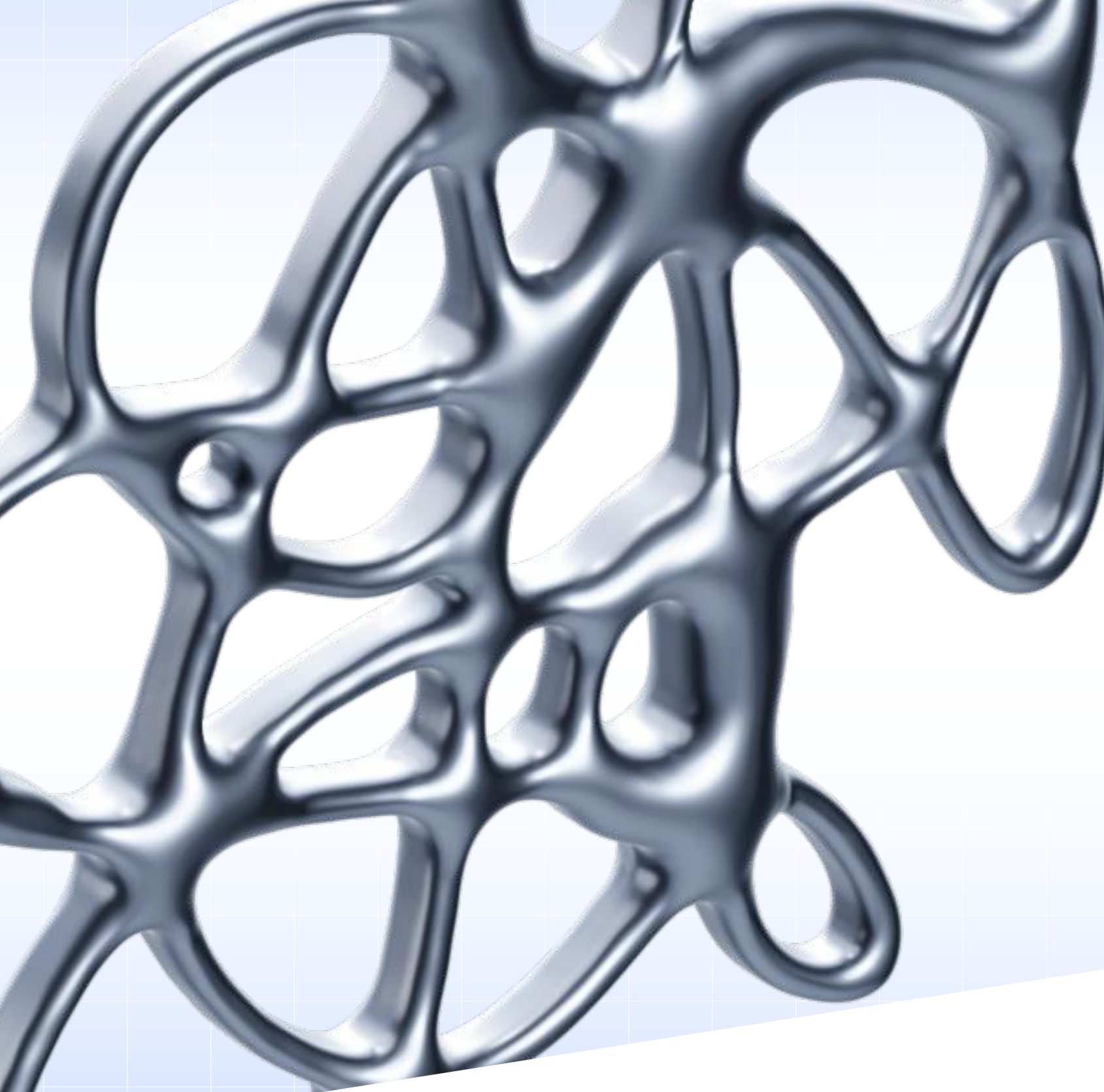
U.S HOUSE PANEL APPROVES BILL GIVING
BIDEN POWER TO BAN TIKTOK



BBC advises staff to delete
TikTok from work phones



IS IT TIME TO DELETE TIKTOK?



“Nearly 20 years on, social media just hasn’t lived up to the promises it made us. They told us it was about friendship and connection, discovery and latterly entertainment. But people are more lonely, more disconnected and the algorithms mean we’re stuck in echo chambers of content.”

- Gabrielle Kaegler, Brand Consultant

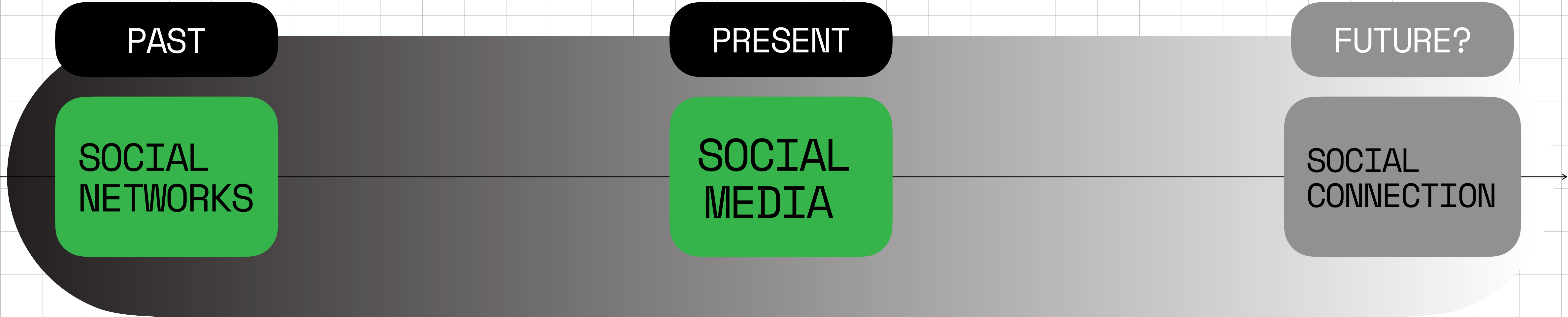
GOING BACK

TO BASICS

SOCIAL MEDIA IS BECOMING HARDER TO DEFINE

1

Oxford Dictionary Definition: websites and applications that enable users to create and share content or to participate in social networking.



1996
The term 'social network' is introduced to describe "computer-supported social networks"

1994
The term "social media" (SM) was first used in 1994 on a Tokyo online media environment, called Matisse.

YOUTH HAVE MIXED FEELINGS

"I use instagram the most and I definitely think it influences me. It influences my body image, self esteem, different opinions, the music I listen to and the clothes I buy in both positive and negative ways.

Malia, 17

"Sometimes social media makes me feel sad, but then I make sure to disconnect and do something to reconnect with myself and nature. Most of the time it makes me feel happy."

Zia, 24

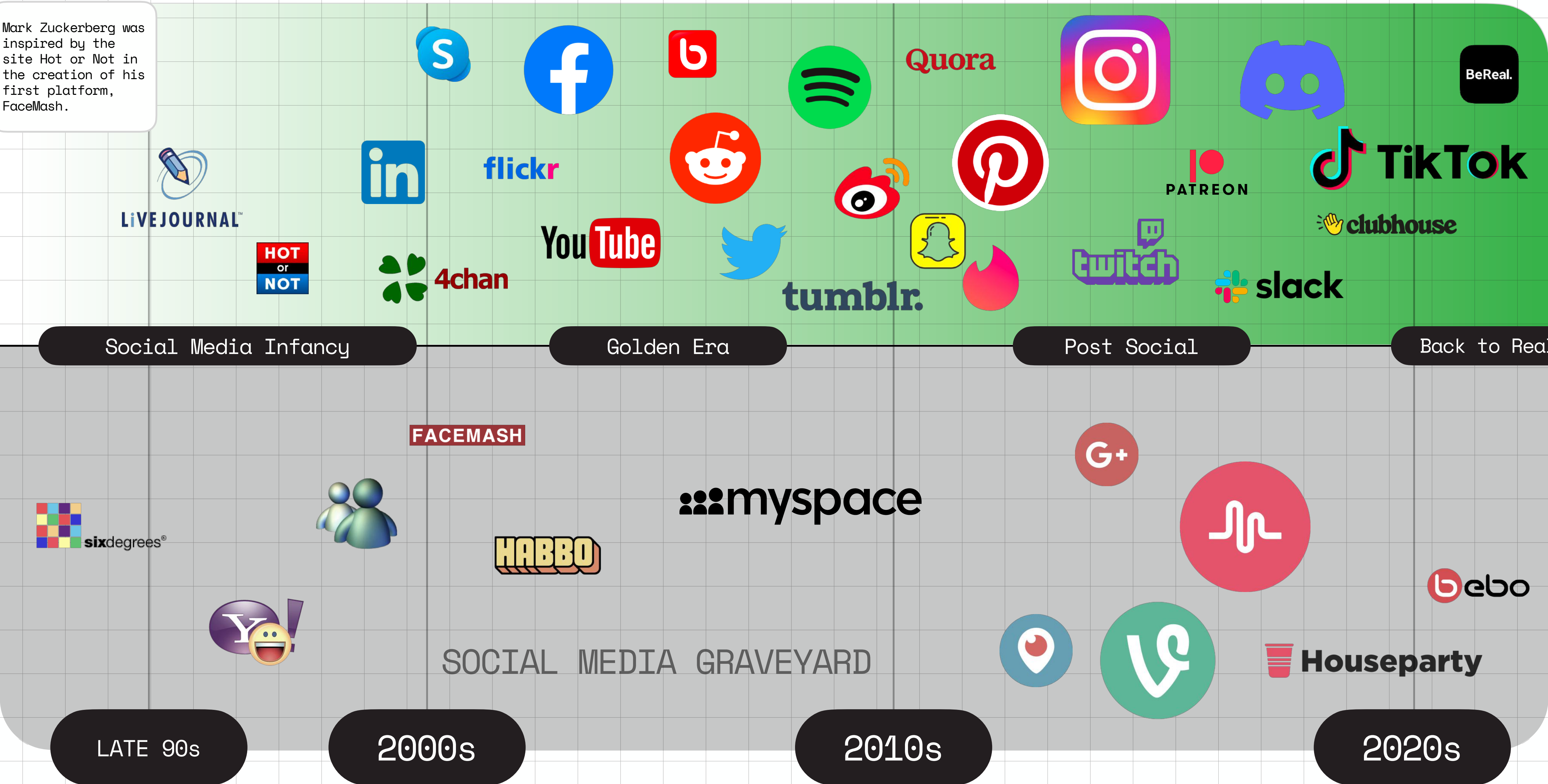
Eddie, 24

"The negative definition of social media; A contract you can't get out of, a chore, a drain on mental health.

The positive; Solidarity from people with similar lived experiences, a place to share work and be inspired by other creatives, funny dog videos."

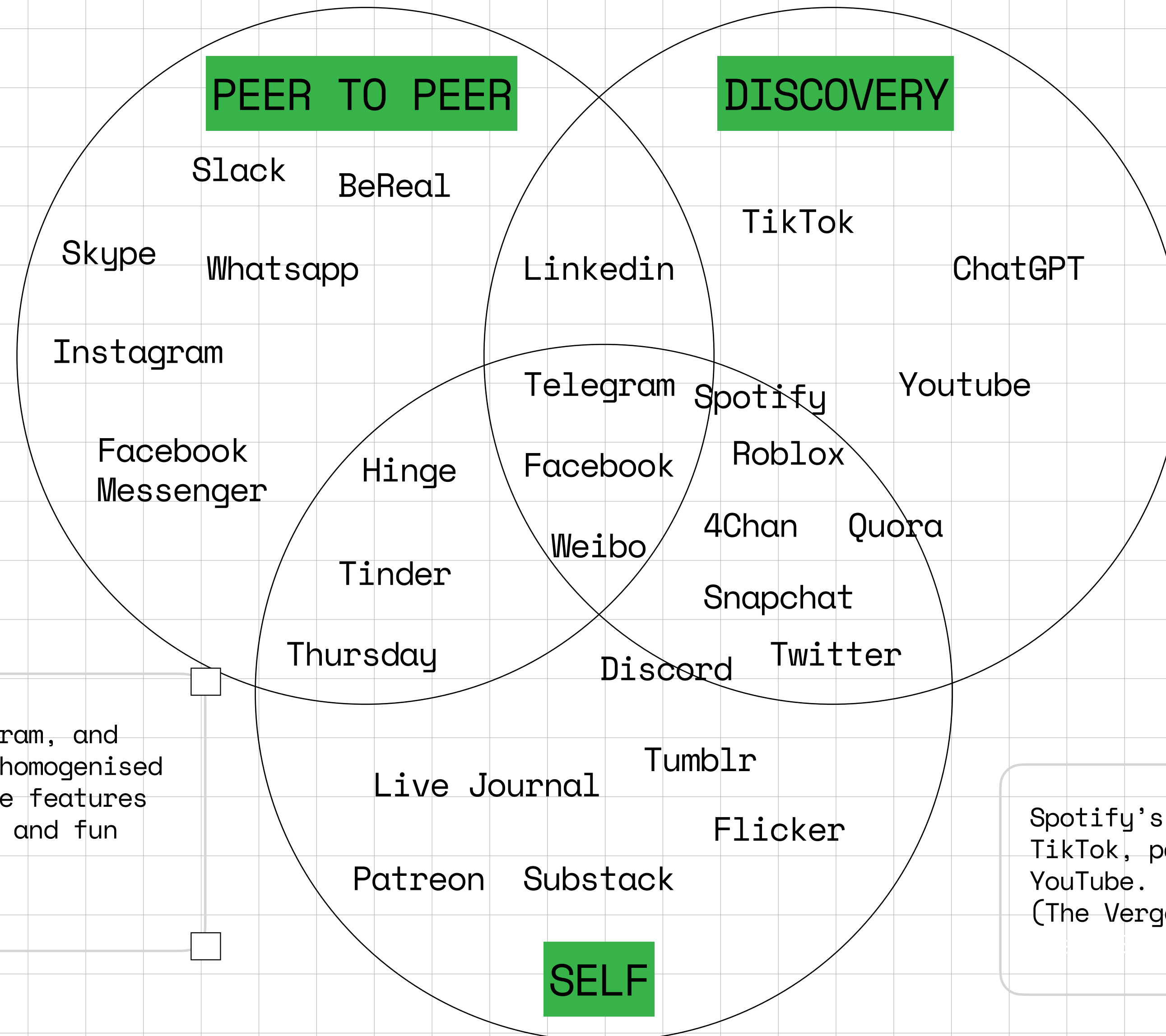
ARE WE GOING BACK FULL CIRCLE?

Mark Zuckerberg was inspired by the site Hot or Not in the creation of his first platform, FaceMash.



SOCIAL MEDIA IS BECOMING MORE HOMOGENISED

Platforms are more multipurpose, constantly adding new features to keep up with each other.



“The differences between Facebook, Instagram, and Snapchat became blurred as the apps were homogenised – copying and sharing essentially the same features – 24-hour stories, disappearing messages, and fun camera filters.”

- Jason Bartz, Substack

Spotify’s new design is part TikTok, part Instagram and part YouTube.
(The Verge, 2023)

THE BIG PLAYERS ARE COMPETING TO KEEP CREATORS ON THEIR PLATFORMS



From February this year YouTube have now let creators monetise from short-form video content.

TikTok is launching TikTok Series: a paywalled content option that will allow creators to monetise their videos on its app and sell them as 'premium content'.



HOW ARE YOUNG

PEOPLE USING

SOCIAL MEDIA NOW?

YOUNG PEOPLE ARE ONLINE MORE THAN ANY GENERATION BEFORE

54% of Gen Z spend 4 or more hours a day on social media out of 8+ hours a day online

Compared with 28% of all adults. (Morning Consult)

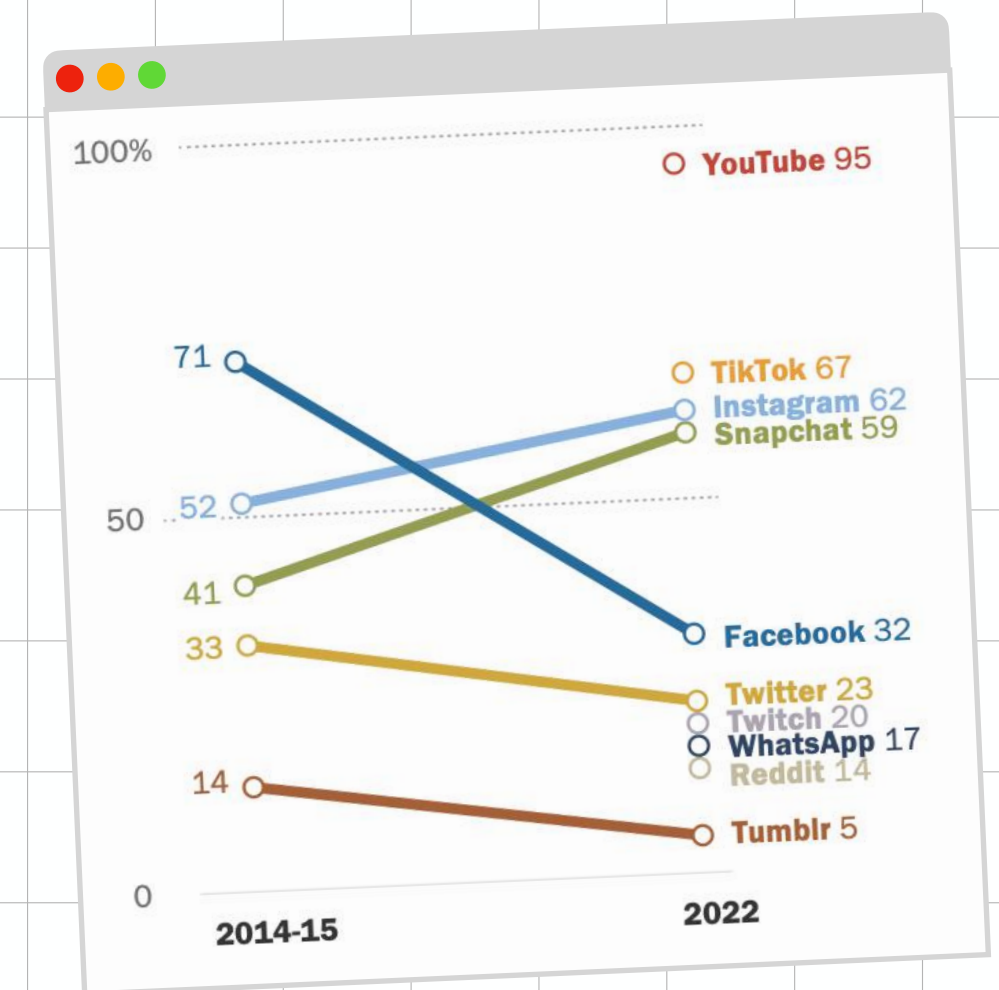
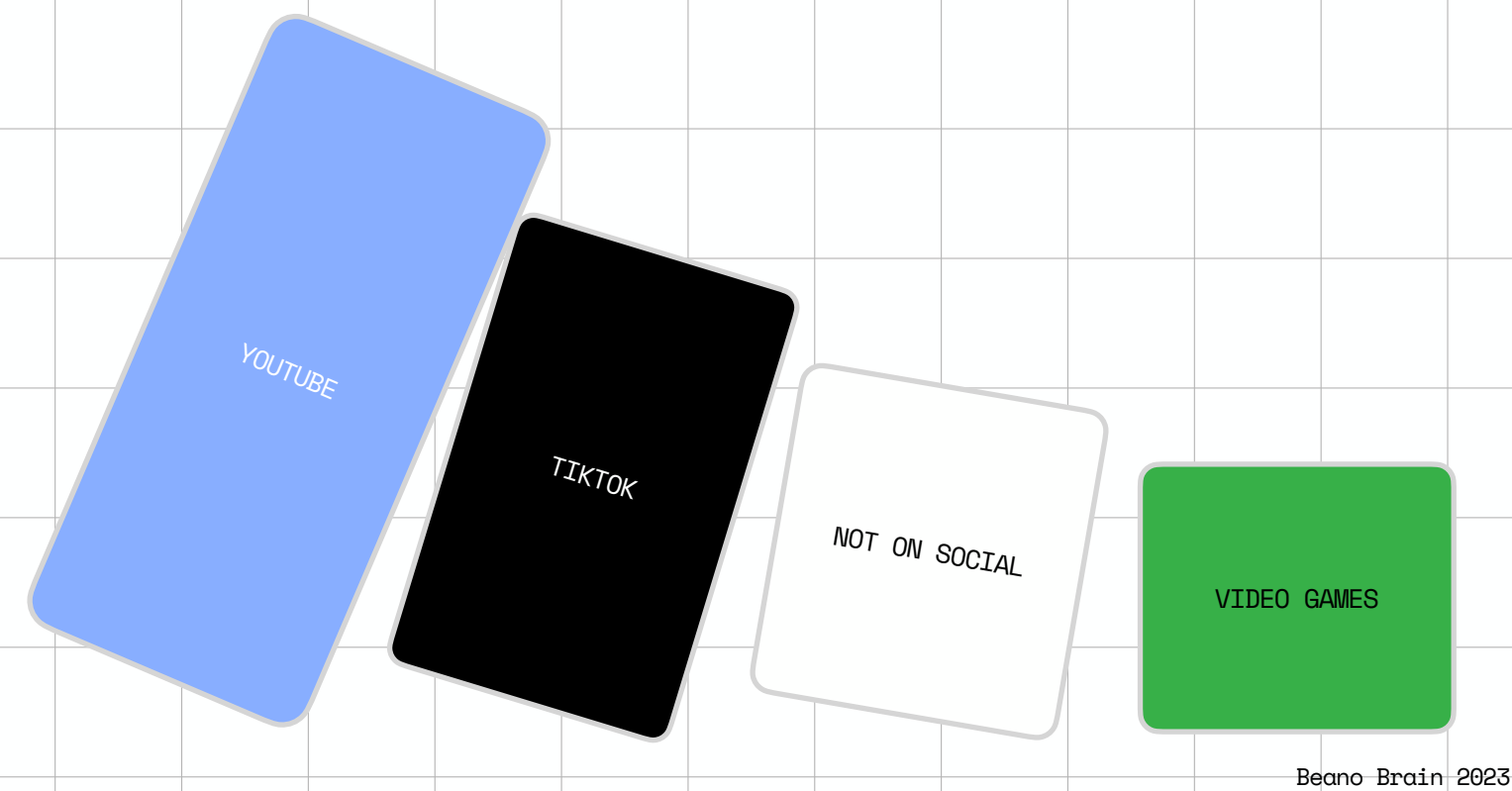
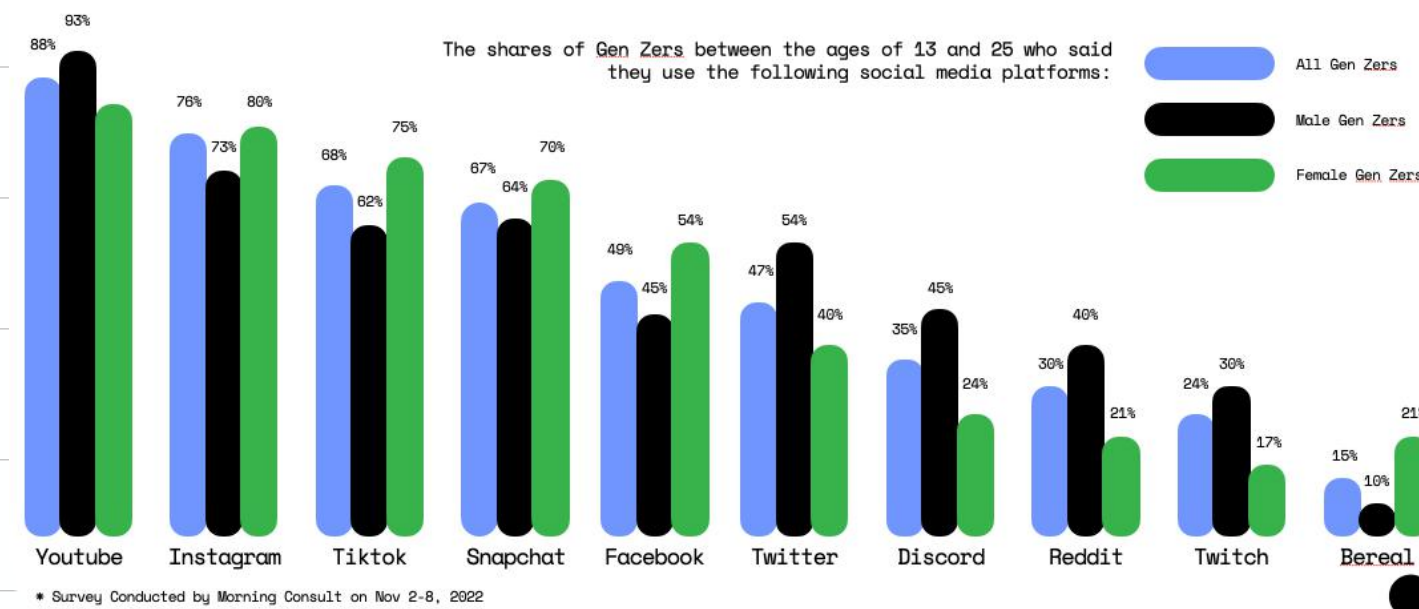
THE WHERE

Gen Z are spending their time on apps optimised for video content.

Their top three are YouTube, Instagram and TikTok. Surprised?

This move towards video-first platforms is also prevalent amongst the Generation Alpha.

Teenagers using the Facebook app are projected to drop by 45% in the next two years. (inews, 2022)



One to watch; Snapchat. In 2023, Snapchat will have 525.7 million users worldwide, up from 493.9 million users in 2022. (Insider Intelligence). In our focus group two Gen Z told us it was their favourite platform.

THE WHAT



ENTERTAINMENT OVER COMMUNICATION

5 hours 28 minutes spent watching video across devices; a closer look reveals a move away from traditional television towards streaming and other forms of video.

2 hours 42 minutes audio including radio, voice and other devices.

1 hour 29 minutes communicating via social media and messaging platforms.

SHORT-FORM VIDEO RULES RIGHT NOW

The average watch time of Dazed's social videos is 11 seconds.
(Dazed Media, 2023)

61% of Gen Z prefer short videos under one minute long.
(Statista, 2022)

THE WHY

Beyond entertainment, commerce and content, how are Gen Z using social media now?

To stay in the know

“You want to be in the know. You get major fomo when you do take mental health breaks from social. You get sucked into the platforms and then you’re not sure what you got from it.”
– Kessler, 23

To make money

“A lot of my friends are on the hustle on social media. They want to get sent the free stuff from brands.”
– Percy, 25

For relief and inspiration

“I use social media for inspiration and for a laugh sometimes.”
– Jethro, 23

As a visual diary

“TikTok becomes a sort of visual diary for me. I record my different outfits.”
– Rae, 22

To connect with others

“To me, social media is an online platform that provides facilities to connect with other people globally.”
– Kate, 18

There are significant behavioural differences between Gen Z and Millennials

Younger generations behave differently online. Forced to share social spaces with older groups, they've created a new visual language, aural prompts and lexicon for themselves. Overall: not trying is cool, thumbs up emojis are a no and (almost) nothing is off limits when it comes to memeification and abbreviation.

Millennial

Gen Z

Self-promotion, perfect selfies → 'Ugly' selfies & self-deprecating videos

Personal profile + separate work profile → Multiple anonymous accounts

Social profile reflective of IRL identity → Irony and humour underscores everything

Hustler mindset: social as a career-builder

👍 = got it!, good job, understood, well done

Not caring is cool

👍 = sarcastic or passive-aggressive "good job"



Youth are fatigued by social advertising

> “In the future, it could mean brands will soon be looking back through the more
> traditional routes of marketing and figuring out how to best use these
> techniques in the digital age.”

> Hatti Rex, Head of Social - Dazed Media

> “Anything I see to do with money and advertising on social media... You’re not
> influencing me. Nothing feels authentic anymore.”

> Kessler, 23

> “We get bored of things so quickly now; everyone’s trying to blow up.. trying to
> connect. We can’t stick to anything. TikTok will at some point die: it will
> get overpopulated with sh**, become a shopping platform and people will get
> bored of it. There are also so many ads now that it’s already annoying.”

> Kessler, 23

They're influenced to shop but don't usually shop directly on platform

> "I don't really shop via social media. Potentially if i see clothes i like but very rarely."

> Ben, 18

> "Trends on social media do influence me, seeing certain trends and styles i like but i don't usually buy them off social media platforms. Usually from shops that people link the items to."

> Mazie, 16

> "Instagram and TikTok makes me want to get stuff I see and it helps me find a lot of things I like. Instagram more for shopping,"

> Malia, 17

POST PEAK INFLUENCER

THE INFLUENCER HAS
BECOME A MASCOT
FOR CAPITALISM



de-influencing

Anti-influencer anger has been bubbling under the surface...It has even given rise to a new demand: We don't want full-time influencers anymore, the crowd chants. We want influencers with day jobs."

- Kate Lindsay, Internet Journalist

TWO-THIRDS of consumers describe their level of trust in celebrity influencers, particularly when it comes to health and beauty products as "low."

(Trustpilot, 2022)

"I follow people very intentionally so my social media consumption doesn't make me feel inadequate or insecure"

Kate, 18

THEY'RE FINDING WAYS TO HACK TO SYSTEM

SOCIAL MEDIA AS SEARCH

"TikTok really is becoming Gen Z's Google" (Morning Consult, 2023)

A NEW LANGUAGE

Enter Algospeak. The use of social media amongst a study conducted with the Acehnese Gen Z has prompted some variations in their language uses, communication styles, and identity shifts. (Communication today, Syiah Kuala University Press)

#WRONGFY

THE ALGORITHM

#wrongfyp

TikTok users have started to clock the app's algorithm and find workarounds, showing a desire for more serendipity. Some are 'hacking' the algorithm to show their content up on feeds where it doesn't quite fit. There are currently 110 million #wrongfyp on content playing into the idea that users have accidentally landed on the wrong fyp.

And are shaping youth culture through their own creativity



NIHILISM & IRONY

Franz Kafka

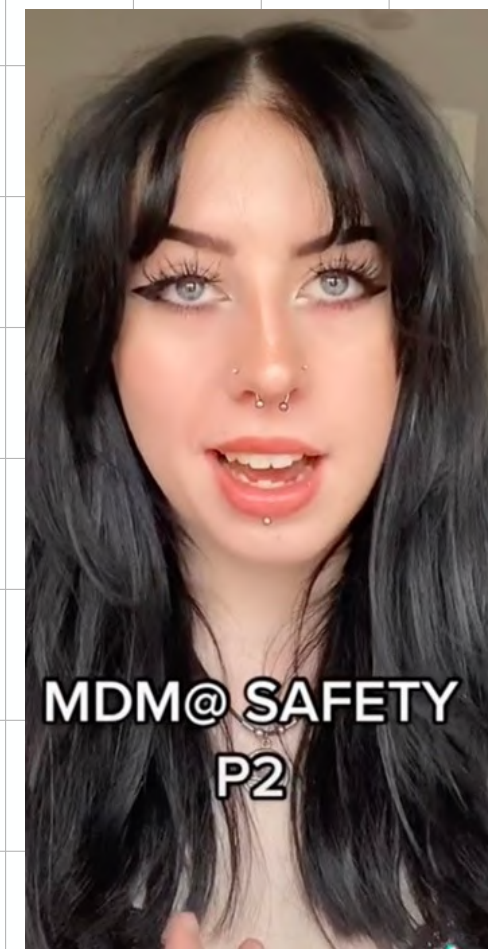
"He captures in an extraordinarily accessible way the way in which many people feel about modern life, where authorities have their own incomprehensible and arbitrary rules and the individual is excluded, alienated, isolated, alone"
- Dr Dan Hall



ANTI- CONTENT

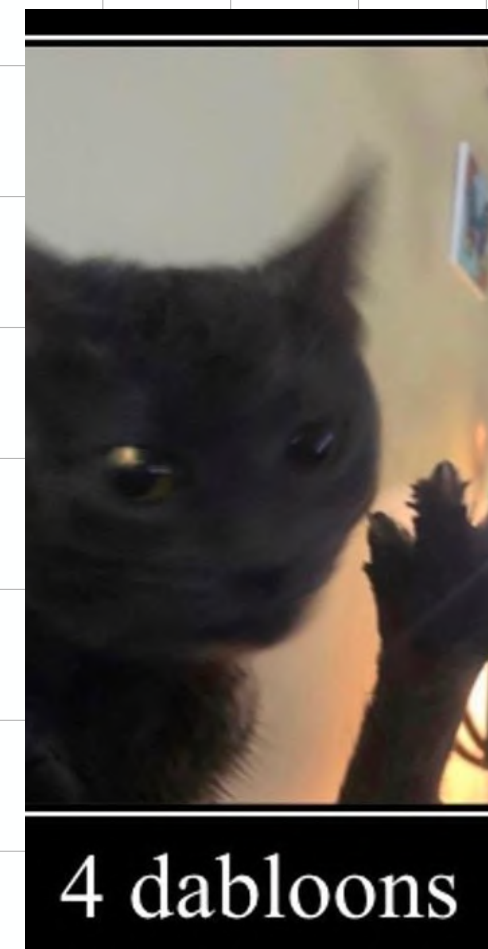
#corecore

our latest attempt to romanticise this reality



EDUCATING EACH OTHER

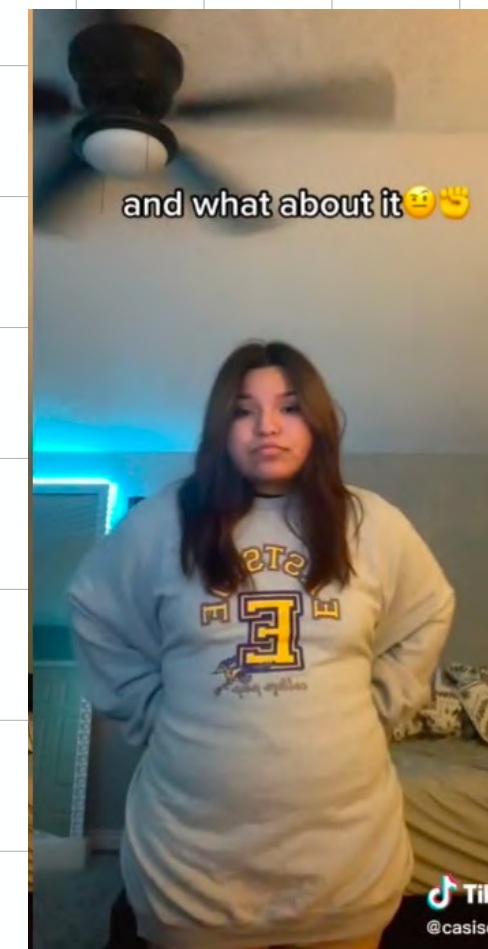
#SeshTok
As politicians continue to fail to protect drug users, TikTok users are spreading life-saving information online



MEME- FICATION

Dabloons: TikTok's latest roleplaying currency.

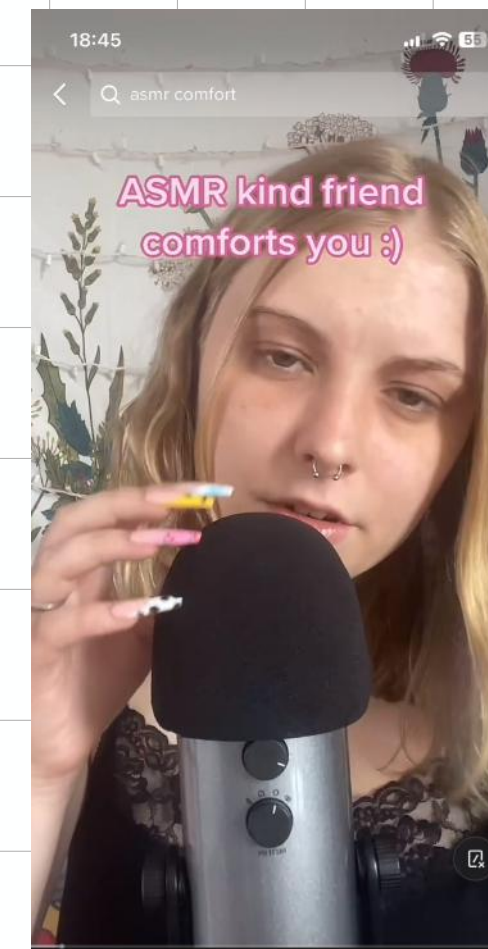
"Maybe we're all collectively yearning for a cute little adventure, where the money we acquire can be spent on things that actually warm and nourish us - like blankets and hot stew - instead of skyrocketing rents and student loans we'll never actually repay."



ANTI- REJECTING SOCIAL CONSTRUCTS

Anti-fat Shaming

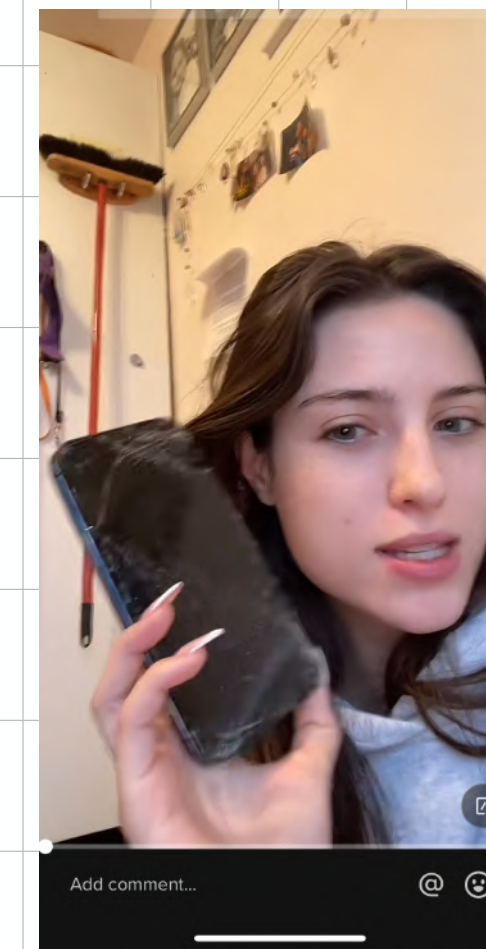
Backlash against fat-shaming videos has triggered a new body positive movement on the app



SHARING COMFORT

#ComfortContent

Satisfying ASMR, relaxing cooking, chill music made to soothe



BEING REAL

#storytimes

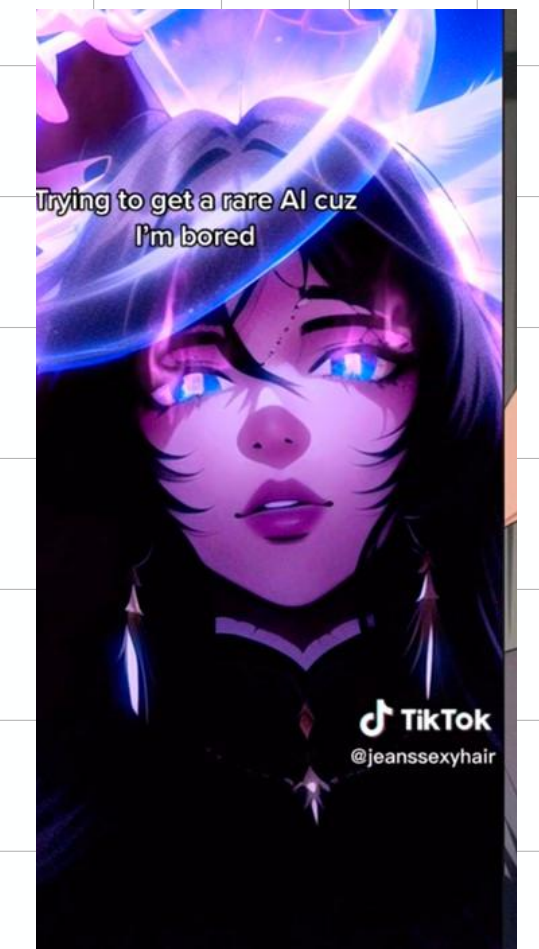
Creators share their relatable, everyday (sometimes cringe, sometimes crying) stories, encouraging more realness and showing they're just like us.



STYLE MOVEMENTS & SUBCULTURES

#FashionToks

Frazzled English Woman #cottagecore etc. etc. are "a conversion of fashion into a content vertical, rather than an embodied product that people might wear in everyday life."



AI IDENTITIES

AI Selfies

"We are fully aware that we have no way to control how our likeness is used, so why not at least have fun while being surveilled?"



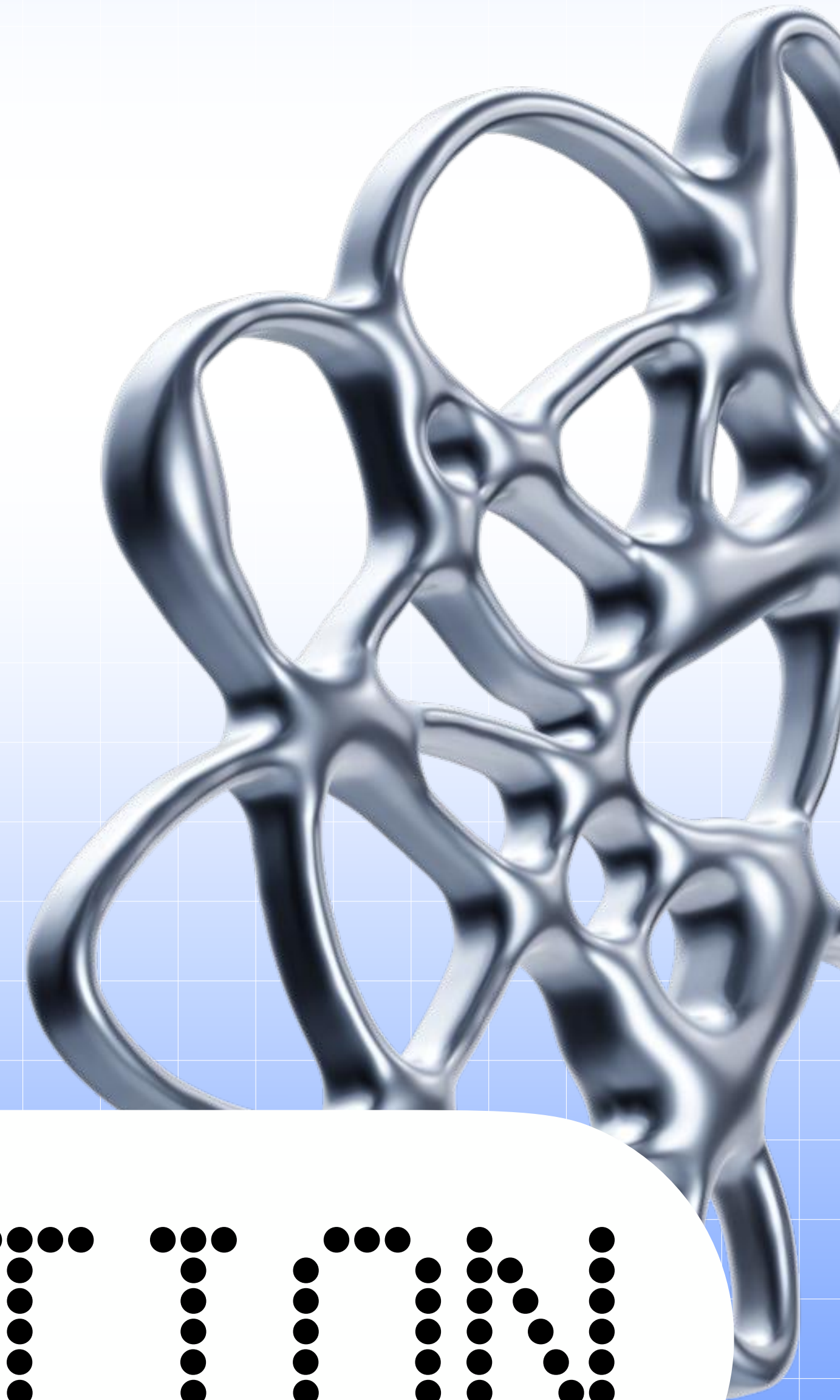
PALSBING FOR A SEC

It is important that we face the facts surrounding the effects of social media. In an article last year, The Guardian said 'it's "embarrassing" how little we know about the effects of TikTok with many teens using it "almost constantly."' (Guardian, 2022)

WARNING!

PROCEED

WITH CAUTION



What do we know about the negative effects of social media?

Productivity issues

Academics have been raising the alarm on information overload for years. In 2009, the Harvard Business Review wrote: “The surging volume of available information – and its interruption of people’s work – can adversely affect not only personal well-being but also decision making, innovation, and productivity.”

Today, TikTok users are 10% more likely to say the amount of content on social is overwhelming. (GWI, 2022)

Depression

Social media has a direct correlation with the decline in Gen Z’s mental health. Internal Instagram data made public by Frances Haugen showed the app’s drastic impact on teen users (Guardian, 2021). We still don’t know what effect platforms like TikTok will have on younger generations.



How this plays out in culture.

How Teens Recovered from TikTok Tics / New York Times, 2023

Addiction

A quarter of US teens who use Snapchat or TikTok use them “almost constantly” with 54% of them saying giving up social media would be “very hard.” (Pew Research Center, 2022)

Polarisation

Social media has been found to fuel polarisation, its impact varies across platforms. (NPR, 2022)

“With the deregulation of Twitter and the rise of decentralized platforms like Telegram and Mastodon, there is growing concern around the use of social to radicalize youth through psyops grassroots and state-backed.” (Office of Applied Strategy, 2023)

IT'S CAUSING AN ANTI-SOCIAL MEDIA MOVEMENT

"There's an entire subculture of 'Luddite' teens who are swearing off social entirely and adopting flip phones to communicate." (Office of Applied Strategy, 2023)

Gen Z is the most concerned about time spent on social media. (Global Web Index, 2023)

"I don't want another form of social media. We're past the point of that. No matter what we make someone will try to monetise it and no-one wants that."
- Kessler, 23

How this plays out in culture.

The Light Phone 2
A second attempt at the minimalist phone aimed at reducing tech use. After initial failure, the founders have added features that give people "tools not feeds". Will it catch on?



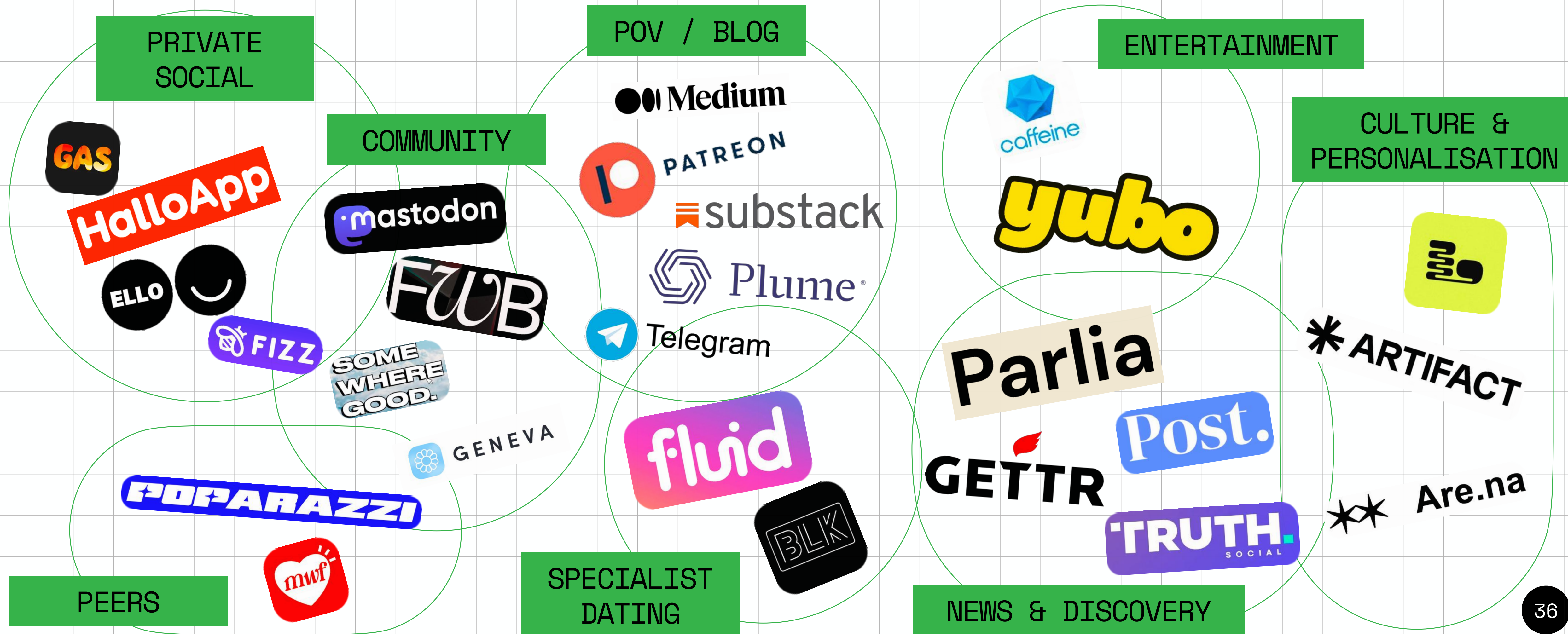
The Log Off Movement

Luddite Club Brooklyn
A New York High School club that promotes liberation from social media.
(New York Times, 2023)

AND A NEW WAVE OF ALTERNATIVE SOCIAL MEDIA PLATFORMS

“Mass social networks lack the quality of desirable social connections.”
- Ana Anjelic, The Sociology of business

Outside of mainstream public consciousness there's already a host of niche, often decentralised social media platforms attracting people to them because of shared identities, values and privacy.



There are new priorities
for youth when it comes
to social media

HUMAN CONNECTION

OWNERSHIP

PARTICIPATION & CREATOR EMPOWERMENT

IN SUMMARY

SAFETY & INCLUSIVITY

01 Decentralised
futures

02 The Finsta
era

03 The closed
network clique

04 Tune into the
now

05 In search of
authenticity

06 Tech powered
creativity

07 The attention
span remedy

08 Nothing beats
the real thing

09 Power in
Fandom

WHAT IS NEXT?

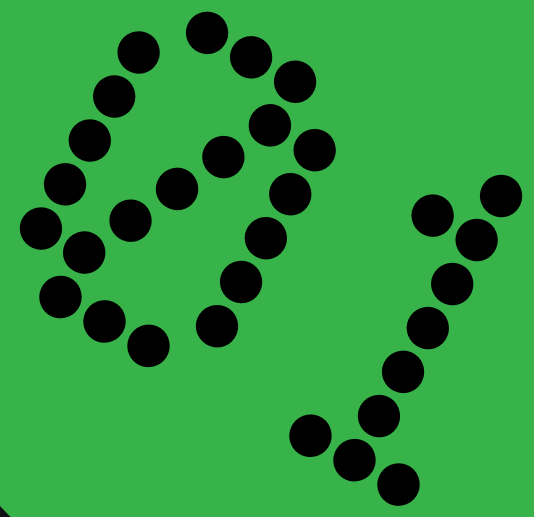
“Instead of sharing more, we may well go back to a more “Myspace” way of managing our online presences... The desire for private spaces will mean that most of us will share to a small audience in more secure networks, rather than for public consumption. Meanwhile, our “public” accounts – the ones that are tied to our lives as citizens and economic actors, will be cleaner, highly managed and as neutral and inoffensive as possible.”

- Hussein Kesvani, Wired, 2021

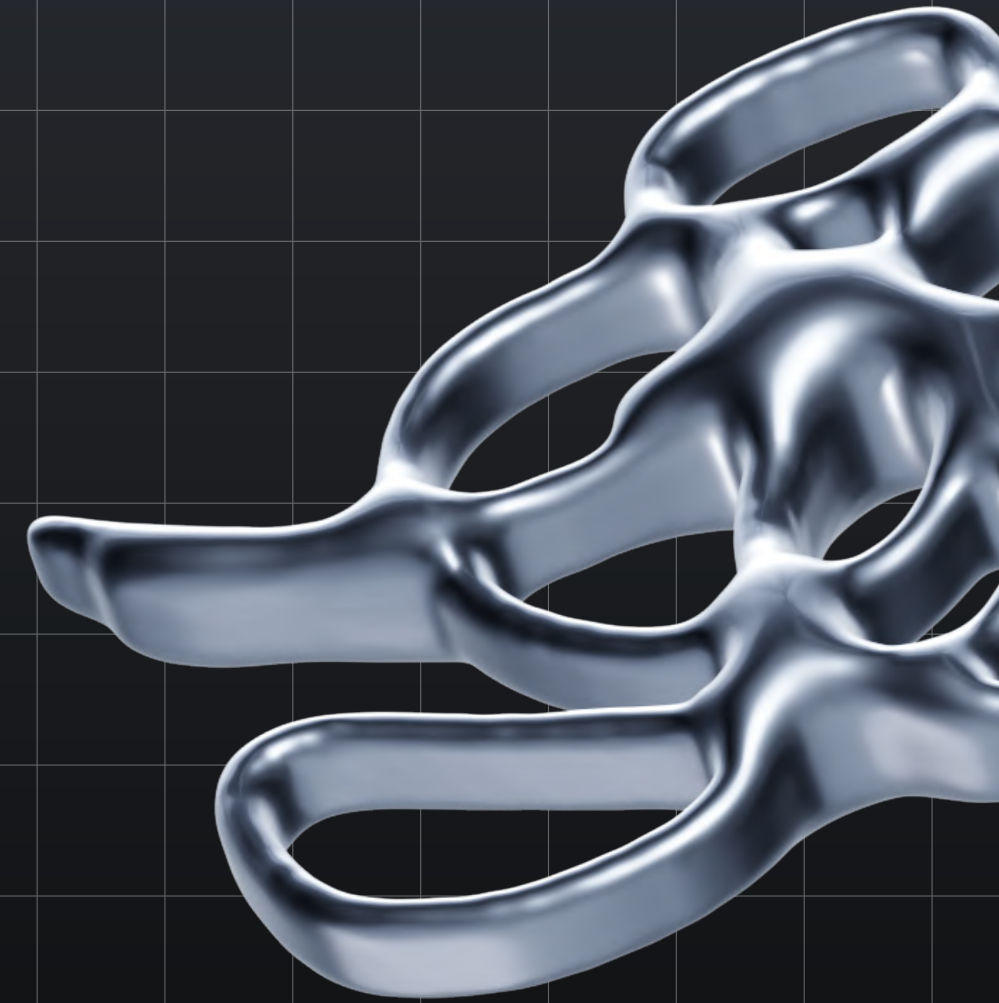
“The real reason Twitter lies in ruins is because it was an abomination before God. It was a Tower of Babel. People are fleeing the tower by the millions, or at least shopping the real estate elsewhere – Discord, TikTok, Tumblr, YouTube, Instagram, WeChat, Weibo, Moj. And some are finding their tribes in the Fediverse, the set of decentralized web apps that includes Mastodon.”

– Paul Ford, Wired, 2023

ENTER THE FEDIVERSE



DECENTRALIZED
FUTURES



Decentralised futures

ENTER THE FEDIVERSE

01.

Deeper understanding of social media means decentralised systems are becoming more attractive. Last year's metaverse hype promised a utopian online future. The vision: a space powered by Web 3.0

This next iteration of the internet is about returning power to the people through decentralised applications; peer-to-peer interactions and transactions; intelligent AI-driven search; use of blockchain; control over content and who can access or profit from personal data. While that dream is far from being realised, we are seeing the first inklings of what a decentralised web could look like.

How this plays out in culture

02.

ChatGPT's ability to understand human inputs and respond similarly offers a more seamless experience than traditional search engines. Its popularity saw Microsoft announce the incorporation of ChatGPT tech into its Bing search engine, followed by the likes of Google and Baidu. Elsewhere, The Fediverse – a network of independent yet interconnected servers which let anyone power their own social networking space or 'instance' – is growing its users base. Servers like Mastodon are the best-known, showing how servers setting their own rules – e.g. blocking hate speech or porn – can benefit people.

elonsucks.org is part of the decentralized social network powered by [Mastodon](#).



Welcome to the anti-billionaires club! We are an English-speaking Mastodon server that is open to everyone, especially those who are anti-capitalist, anti-democracy and strive to bridge inequality.

Elonsucks.org (powered by Mastodon) is one of many Fediverse instances catering to niche interests and bringing like-minded people together. From gaming, poetry and K-pop stans to coders and anti-capitalists, there's something for everyone.

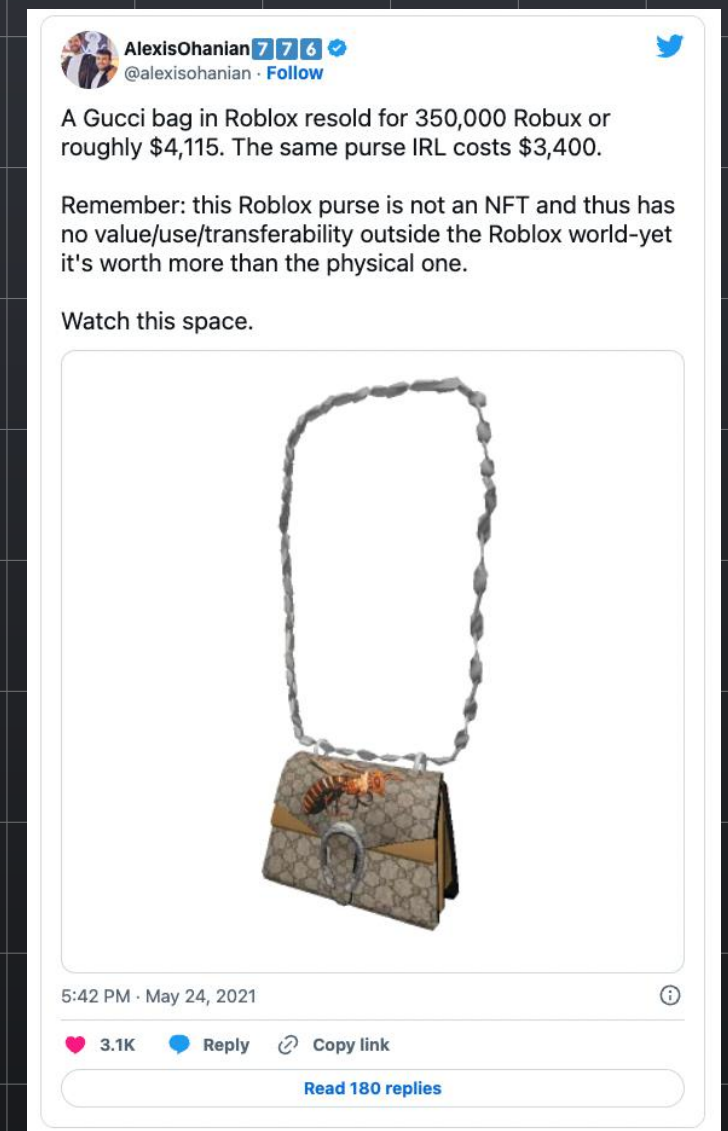
Gaming social networks

How this plays out in culture

In our 2022 survey around the Metaverse we discovered that the main reason why young people were using digital spaces was to connect with other people (Dazed Metaverse survey 2022).

Recent attention and growth in gaming has prompted some brands to experiment with in-game commerce. The approach is still in its infancy, however, and gaming audiences are less accustomed to heavy advertising in these spaces. The gaming industry itself was worth more than music, movies and television in 2021 (Marketwatch), yet it accounts for less than 6% of total ad spend (Marketing Dive, 2022) - highlighting an untapped opportunity. The challenge for brands is integrating themselves into gaming worlds without disrupting the user experience.

The “Gucci Garden” Roblox experience was a pop-up styled as a series of themed-rooms where the users’ avatars transform according to a room’s colours, patterns, and special effects. Users could interact with others and purchase limited-edition virtual Gucci items for their avatars. The bee-embroidered Dionysus Bag, sold for (350,000 Robux) \$4,115 more than the price of the physical bag in the virtual second-hand market where bids on the bag skyrocketed.



American Eagle supported its “Members Always” spring campaign with Roblox’s Livetopia, launching a curated mansion-like space with various activities and virtual try-on versions of the retailer’s seasonal apparel. More than 5 million people dressed their Roblox avatars in the products, with the activation drawing over 7.5 million unique users - 50% higher than what American Eagle anticipated (Marketing Dive, 2022)

“With this growing distrust against creators, we’re likely to see a shift towards platforms where you aren’t required to be the face of your content but this seems unlikely on TikTok at present.”
- Hatti Rex, Head of Social at Dazed Media



EMBRACING ANONYMITY AND PLURALITY ONLINE

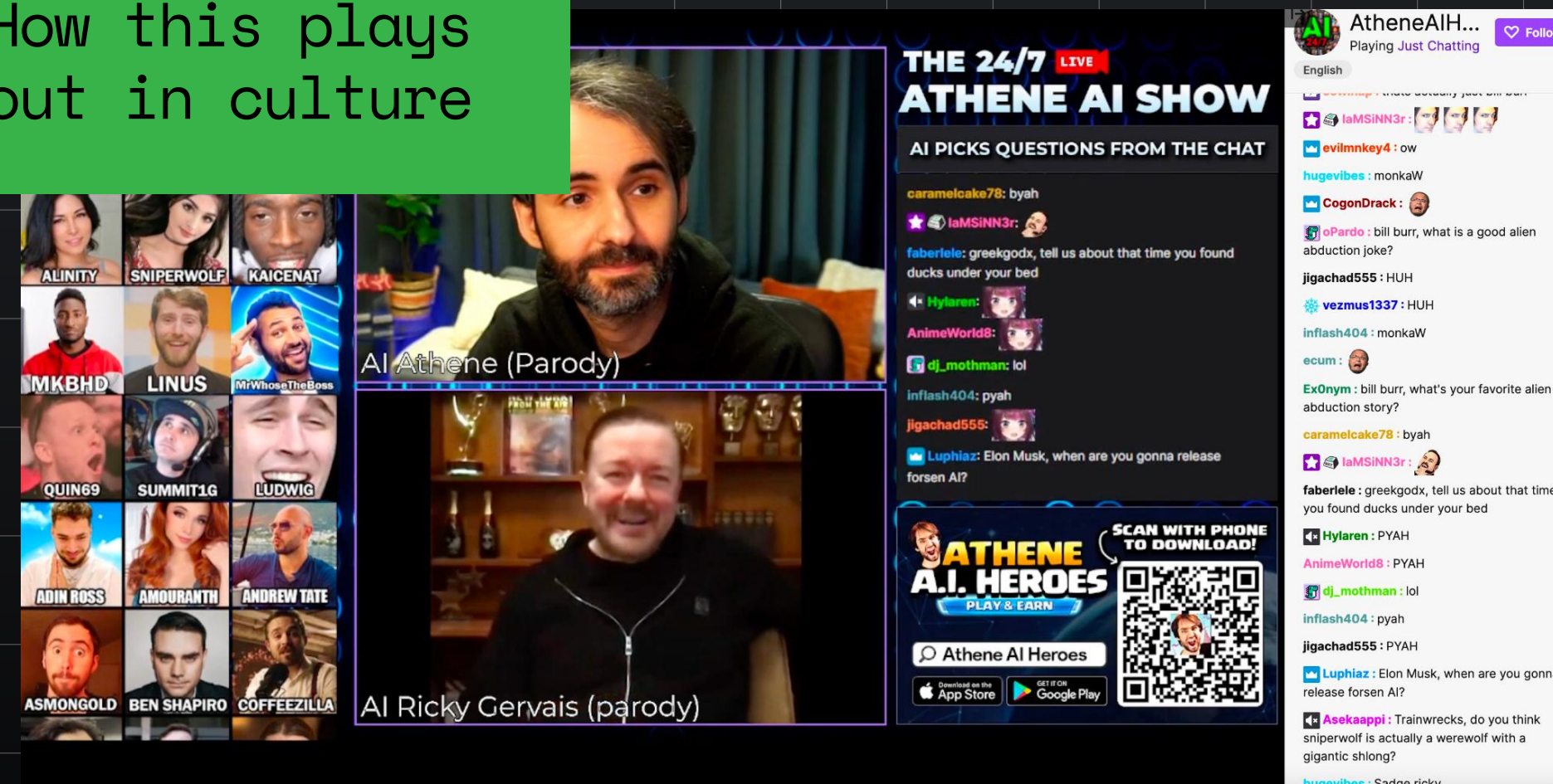


The Finsta Era

02.

New networks and technologies allowing people to experiment with alternate identities whilst hiding their own are taking anonymity a step further. What can be used to stay private online can also be nefarious – Twitch's recent spate of deepfake porn incidents highlight this. In the future, tech which lets us post convincingly as anyone we want – real or not – will continue to raise serious privacy and safety concerns on social media.

How this plays out in culture



AI Athene Show on Twitch

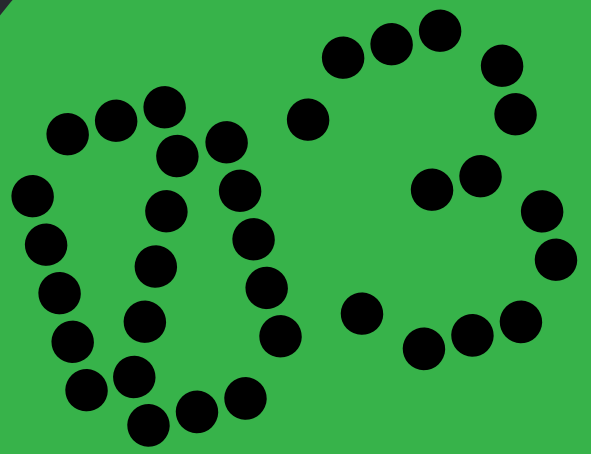
“The Athene AI Show is a Twitch channel that streams 24-hours a day and features AI “parodies” of real people. Athene is a Belgian streamer, real name Bachir Boumaaza, and he now has a channel that is cycling through different AI versions of real people “talking” to each other.” Garbage Day Substack, 2023

01.

Online oversharing is done. 67% of Gen Z aren't interested in fame (Dazed Survey, 2022) and people with lower social media use are even seen as more attractive (Dazed, 2022). As well as anti-influencer, anti-individualist sentiment, Gen Z know that social posts come back to haunt you and their data is being turned into a commodity.

Practicing some form of online anonymity is an everyday occurrence via Finstas, private stories and close friends groups. In the future, it's likely we'll see platforms where users don't have to be the public face of their own content becoming popular.

“People are looking for – and finding – trust and bonds within self-governing and altruistic groups on platforms like Reddit, or through authentic recommendations from relatable micro-creators on TikTok. Niche networks can be more intimate, developing trust through direct access to real, like-minded people and taste connoisseurs (‘just DM me’) instead of automated customer chatbots operated by brands.”
(Trendwatching, 2022)



THE CLOSED

BACK TO ‘SOCIAL’ MEDIA

NETWORK: CLOSE

The Closed Network Clique

01.

The late Mark Fisher said on K-punk that, “We should use [social media] as a means of dissemination, communication and distribution – but not live inside it. The problem is that this goes against the tendencies of handhelds.

We all recognise the by now cliched image of a train carriage full of people pecking at their tiny screens, but have we really registered how miserable this really is, and how much it suits capital for these pockets of socialisation to be closed down?”

02.

This point couldn’t be more relevant today. As Gen Z search for increasingly meaningful connections, they’re realising that the huge online groups they operate within won’t deliver. Instead, more forum-style, closed network community spaces optimised for interacting with peers are becoming more popular.

These networks – like Discord channels and Fediverse instances – prioritise shared interests and privacy to create safe, welcoming spaces where people can connect on a deeper level. In fact, 65% of Gen Z say they feel more confident online if they’re using community-focused apps over feed-based platforms like Instagram (The Move Community, 2022).

How this plays out in culture



NICHE
Web3-based social platform focuses on user-owned communities



LETTERBOXD

“One of my favourite social media accounts is Letterboxd. It is a platform where you can follow your friend’s profiles and see what people are watching. I like the way that it’s creative/inspiring and not focused on your life. Eddie, 24



SOMEWHERE GOOD

Somewhere Good is a voice note-based social app for intimate community conversations.

ESEA Sisters Discord Group

CASE STUDY



What it is: A space for East and South East Asian women, trans, non-binary and genderqueer folk to share joy and resistance.

Members: 600+

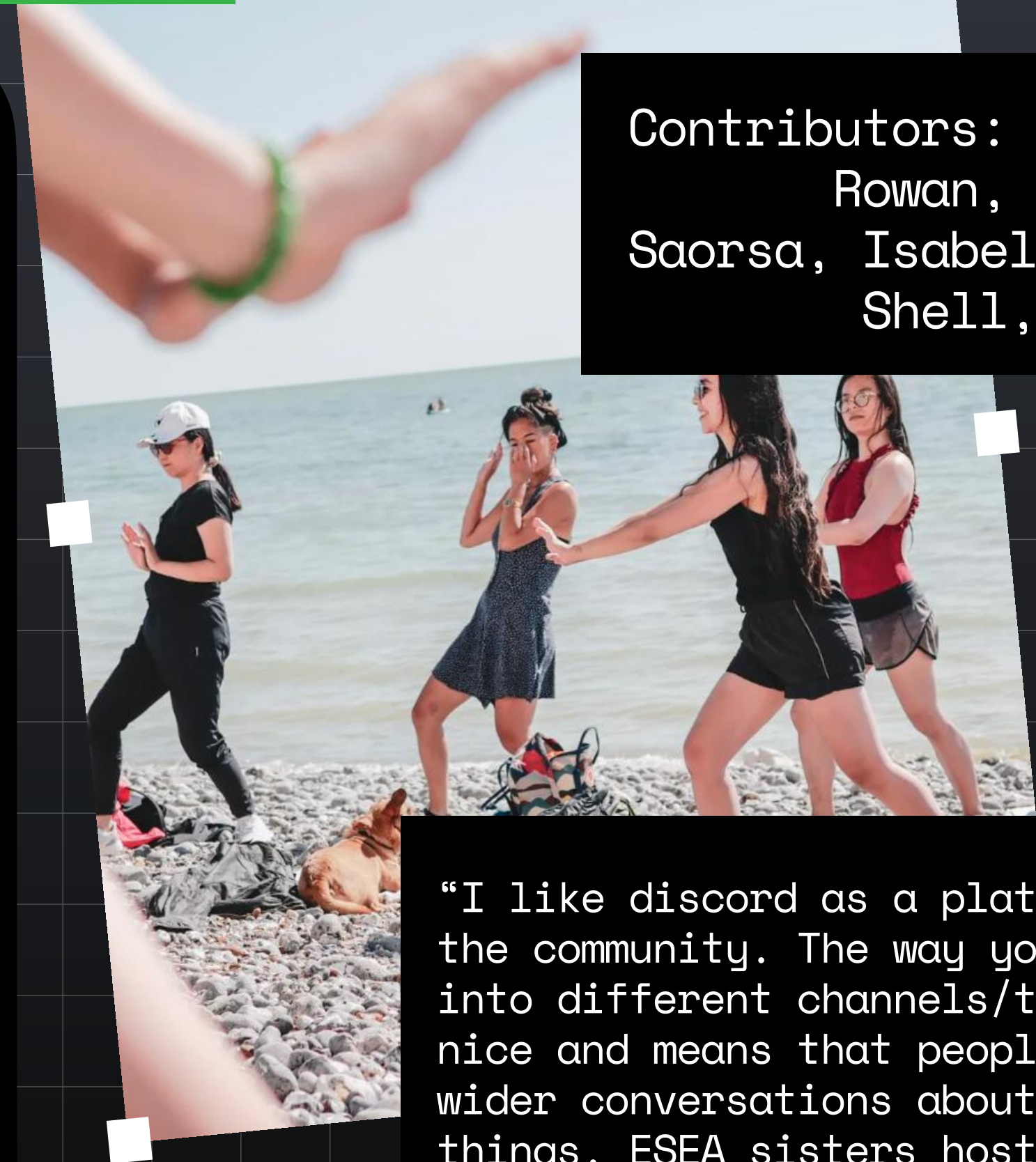
Date Started: 2020 In the Pandemic

Why It Started: It's a safe space for our community to interact with each other, a breath of fresh air to be able to share opinions, news, advice, and events and even photos of pets without fear of being trolled.

Why We Use It: ESEA Sisters has helped us all to deal with that trauma in different ways: we campaign for better media treatment of the ESEA community. You don't need to explain yourself, you're instantly accepted and the community is so caring. Everyone is there for a similar reason so it creates a wonderful atmosphere where everyone has a say. I've made many friends who are so important to me through ESEA Sisters.

How do you use it: We create platforms for our members and the wider ESEA community to express our art and joy; we try to build a new way of working together in a non-hierarchical way and we try to be inclusive with a hybrid of online and in person activities and events.

Contributors: Frances,
Rowan, Frankie,
Saorsa, Isabella, Mai,
Shell, Rosanna

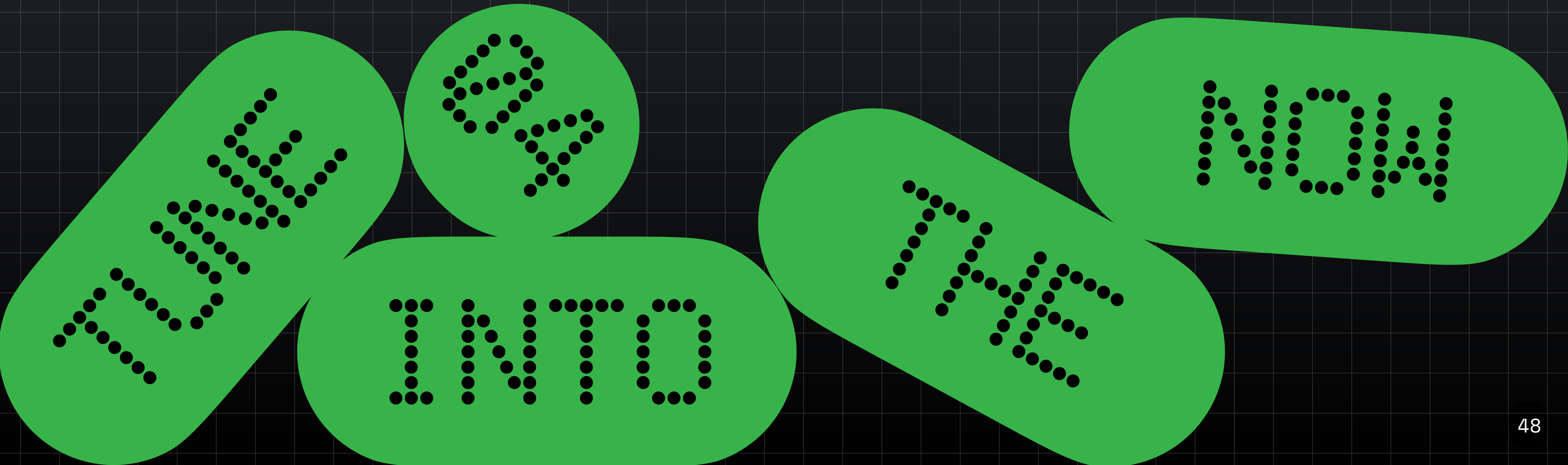


"I like discord as a platform for the community. The way you can go into different channels/topics is nice and means that people can have wider conversations about various things. ESEA sisters host IRL meetups taking it off the platform, so there's a sense of IRL and online; it's been a nice way of meeting other ESEA people in the world."

Lils (Community Member)

“On platforms like TikTok, you get five seconds to get to know someone or the products they’re talking about. On YouTube, you get more [time] but the only interactions are in the comments.”
- @prettierthan, Newness Content Creator

THE RISE OF LIVE SOCIAL VIDEO



Tune into the now

THE RISE OF LIVE SOCIAL VIDEO

01.

Live video boomed during the pandemic as the next best thing to IRL. Now? Gen Z are seeking live videos with interactive features and 53% of them allow them to connect and chat with friends or other viewers during the stream (Agora, 2022).

How this plays out in culture

newNESS The logo for newNESS, featuring the word "newNESS" in a white, lowercase, sans-serif font, followed by the word "beta" in a smaller, lowercase, sans-serif font inside a white rounded rectangle.

02.

Live video is especially big in East Asia. 80% of China's \$5 billion live streaming market comes from 'real life' streamers who cover everything from luxury fashion to just chatting about their everyday in return for cash gifts from fans (Marketing To China, 2022).

17 Media, a global live social entertainment platform founded in Taiwan produces over 10,000 hours of content daily. In its first 250 days operating, it saw over 10m downloads – more than either Instagram or Facebook.

03.

While live video ostensibly creates more connection between creators and fans, as more people live their lives online, they're also getting lonelier. (National Geographic, 2019)

NEWNESS, the live-streaming platform for the beauty community, uses authenticity and positivity to combat online hate and trolling. It raised \$3.5 million in investment last year. (Dazed, 2022)

Live social shopping

CONTENT. COMMERCE. ENTERTAINMENT

How this plays out in culture

01.

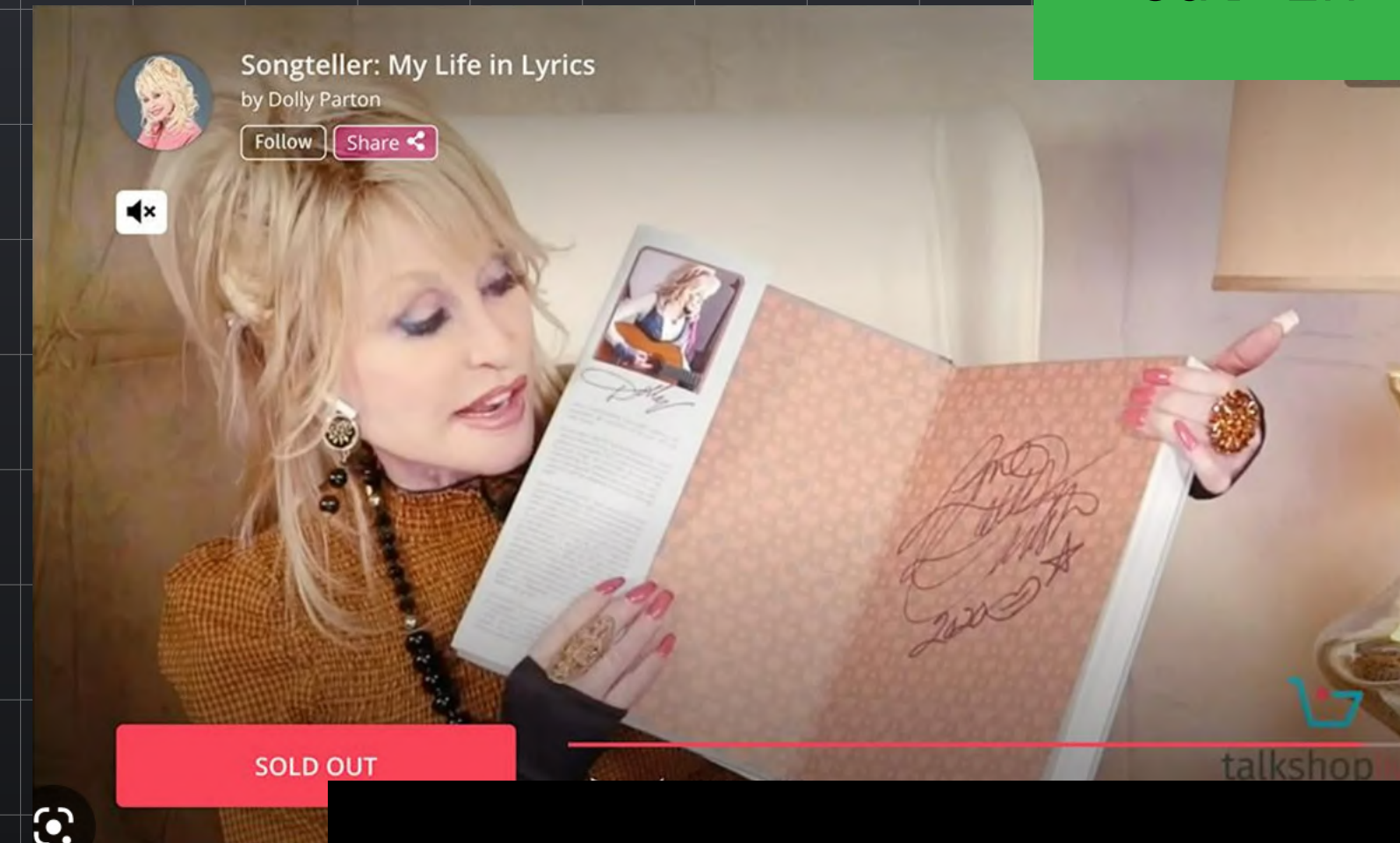
Shopping has become a favourite user activity on any platform which offers live. In China, live commerce is huge with 44.9% of all Chinese Netizens having purchased via live (Influencer Marketing Hub, 2022).

In the US, live shopping is worth \$400bn and makes up almost half of all ecommerce spending (Census, 2022).

02.

83% of Gen Z already shops on social media (Inside Intelligence, 2022). This group will be important for fuelling the rise in social shopping technology; they already account for 47% of live stream purchases in the US (Influencer Marketing Factory, 2022).

Other new technologies like AR and VR are also transforming social shopping, bringing it closer to the novelty of bricks and mortar experiences. 22% of Snapchat users say they're interested in using AR to make shopping more fun (Shopify, 2022). As the technology develops, brands like Cartier are moving away from AR as a toy and utilising it as a storytelling tool (Business of Fashion, 2023).



Famous for celebrities live-selling merch, Ecommerce streaming site Talkshoplive is reportedly partnering with TikTok to help boost the app's live sales performance.

New Paths to Purchase

> What influences purchases?

> “Parasocial relationships between consumers and influencers have become a key driver of purchase intention. Influencers commit to putting their followers first and to cultivating communities of consumers with shared passions and interests. In turn, consumers look to influencers for credible recommendations and honest product reviews.” (Sprout Social 2022)

> Early adopters are prepared to spend more when using AR and VR. More than eight in 10 (85%) consumers currently using AR and VR have already started social shopping.

> Mobile and app use has risen by 9% since 2020 with the exception of gaming apps which saw a 5% decline in downloads in 2022 (Data.AI). As use continues to grow, retailers are set to focus on app development, in-app purchases and shopping events. (LSN Global, 2023)

In 2023, Social media will change, with young users increasingly pushing for more meaningful online interactions. The dominant “legacy” players, like Facebook, Instagram, and Twitter, will give way to platforms that prioritize simplicity and authenticity.”
(Wired, 2023)

SEEKING AUTHENTICITY ON SOCIAL MEDIA

05

IN SEARCH OF

AUTHENTICITY

In search of authenticity

01.

What does it mean to be authentic on social media? It's the question on every marketer's mind. Chris Black, Founder of Done to Death Projects, describes it as a "rejection of perfection", a more "brash approach" to self-presentation, low-fi content that shows humanity, warts 'n all. The problem with social media authenticity is that trying to be authentic is inauthentic.

02.

Deinfluencing, the latest anti-influencer trend, has replaced a glossy sheen of perfection for negativity masked as authenticity. "Balanced reviews get the least engagement, which is why you see people move to extremes," according to beauty TikToker Charlotte Palermino (Dazed, 2023).

03.

Authenticity is perhaps best reframed as nuanced expressions of good, bad and ugly, while also remembering that The Feed is still a collection of what brands, influencers and friends have created explicitly for us to see.



How this plays out in culture

Poparazzi paints a less biased picture of its users by having their friends create their profiles. Now the app's creators are launching a spin off called Made With Friends which allows users to discover more about themselves based on prompts answered by their inner circle. (TechCrunch, 2022)

In search of authenticity

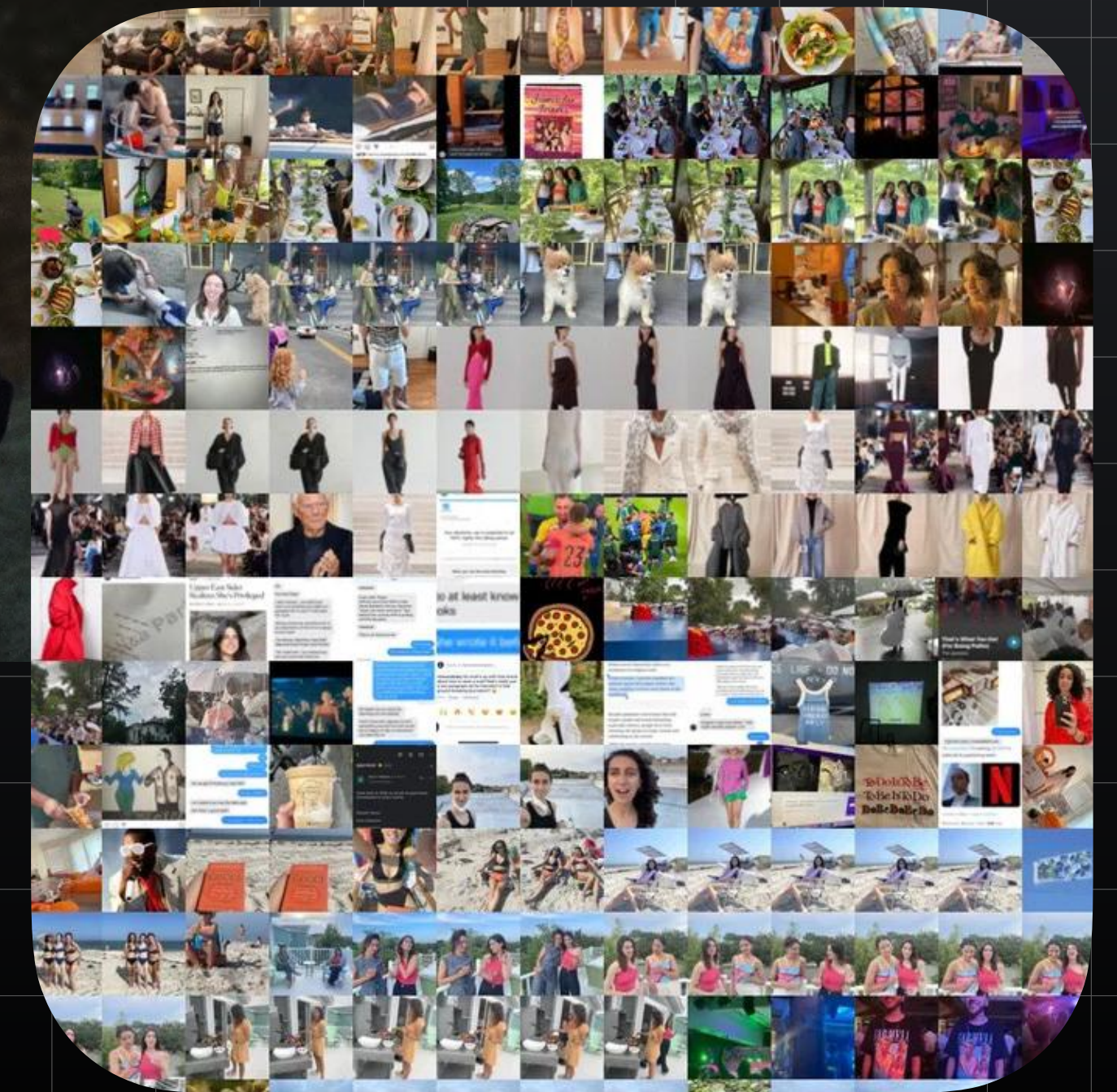
TRENDING

Cringe culture



ugly selfies

photo dumps



“I mainly use social media for reasons related to my creative practice. It helps me keep up to date with artists I like and what people/brands are creating. It’s a really useful inspiration resource for references and archival research.”

- Lils, 26

TECH

OPENING ACCESS TO NEW
CREATIVE MEDIUMS

POWERED



CREATIVITY

“There’s a return to blogging and earlier social media formats. We see that with Substacks, more intimate blogs. People are yearning for this early social media format, centred on some long form content and an awareness of how bad short form content is for them.”
- Biz Sherbert, Culture Editor at DigiFairy

RE-APPRECIATION OF LONG FORM

ATTENTION

SPAN REMEDY

The attention span remedy

01.

Gen Z are seeking slower, more mindful engagement with information which the endless onslaught from short-form feeds fails to deliver. Higher-quality content that's worth spending time with is gaining ground with this group, prompting formats like blogs and video essays to become more popular again.

Short-form platforms are taking heed. Douyin, China's short-video platform has already opened the app up to content of 30 minutes or more and TikTok looks set to follow. Expect other major platforms to adopt long-form as interest continues to grow.

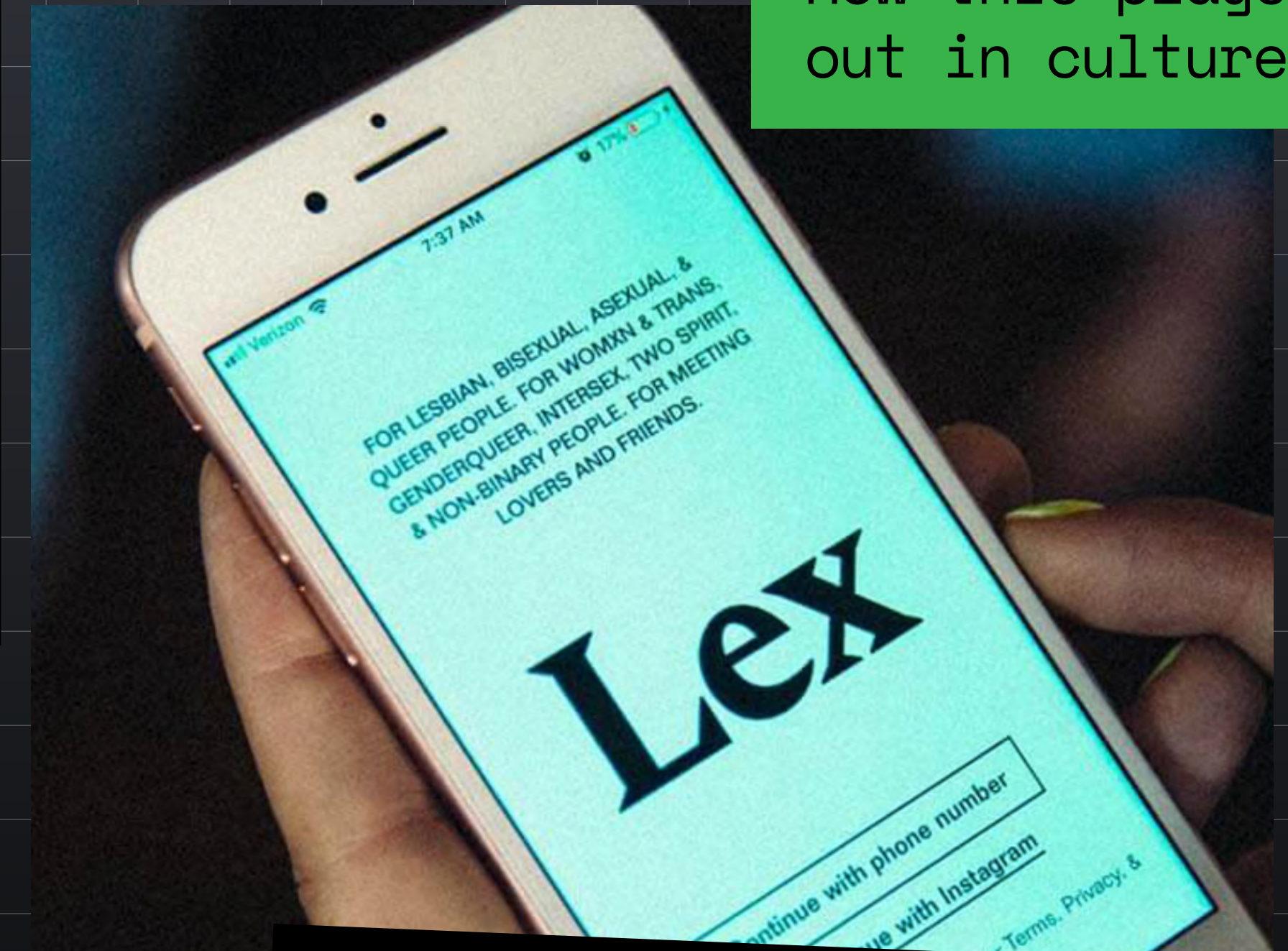
02.

Long-form in numbers

- 80% of users on blogging platform Wattpad are Gen Z (Glossy, 2022)
- 59% of Gen Z watch longer versions of videos that they discover on short-form video apps (Think with Google, 2022).
- Searches for video essays have doubled since 2019 (Think with Google, 2022)
- 71% of podcast listeners are Gen Z/millennials (GlobalWebIndex, 2022)

RE-APPRECIATION OF LONG FORM

How this plays out in culture



LEX

A dating app based on the "Personals" Instagram account and is entirely text-based, inspired by "old school newspaper personals."

“I want to go to dinner, I want to go to shows, I want to travel, that’s also what the young people I know actually want to do. I don’t think that we’re really at this point where we’re gonna start f***** robots. I don’t think we’re there yet.”
- Chris Black, Founder of Done to Death Projects



FACE TO FACE...THE BEST
INTERFACE

NOTHING BEATS

THE REAL

THING

Nothing beats the real thing

Face to face...the best interface

01.

With there being little or no distinction between online and offline for Gen Z (New Consumer, 2022), social media could also be extended in the real world.

Brand consultant Gabrielle Kaegler echoes this thought, saying that, "Brands could think about showing up in unexpected places IRL, giving back to the community through giving the opportunity to connect."

How this plays out in culture

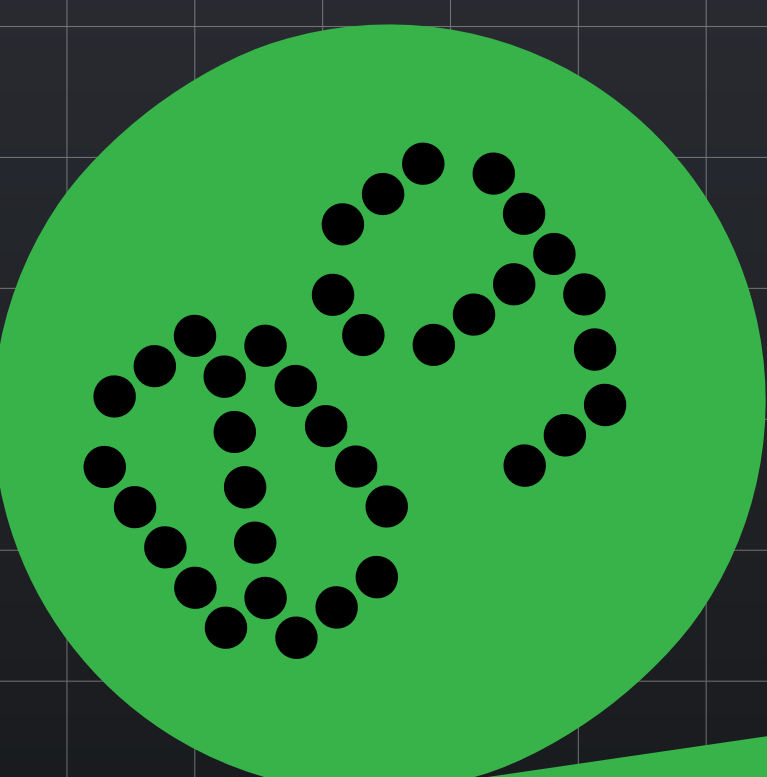


DAZED CLUB

DAZED CLUB
Dazed's membership programmes physical events as a core part of the offering. We've discovered that one of the member's (average age 19) main reason for joining was to connect with others.

“People are monetizing their passions and the economic significance of fandoms will grow in scale. Fandoms have become political and social movements in their own right, and brands are increasingly learning how to lean into their communities to harness them.

- 2023 Social Media Futures Forecast, The Office of Applied Strategy



FAN COMMUNITIES ARE THE
NEW INFLUENCERS

POWER IN

FANDOM

Fandom Power

Fan communities are the new influencers

01.

Fandoms have hit the mainstream, changing the sphere of influence. What distinguishes them is the labour of love they put in to creating content (art, fiction, archives) around a specific interest. These highly engaged communities have, unsurprisingly, peaked the interest of brands, many of whom now offer rewards for fan-creators in the hopes of building their own brand fandoms. But what they're failing to realise is that paid-for content is frowned upon in these worlds. Dedication is as important as creation. Commercial 'fandoms' like Bored Ape, who's value fell by 98% in 2022 (Dailycoin) are proving unfit for long-term brand building. Instead, brands should look to integrate themselves in existing worlds of fandom rather than trying to manufacture their own.

"If a property is actually good enough to spin up a fandom on its own, the paradox is that that fandom will then in turn be entirely resistant to the idea of joining up what it perceives as its own leisure with the financialization inherent in a token scheme."
(Garbage Day Substack, 2023)

"In web3 creative projects, underlying ownership of tokens gives fans a built-in business model and incentivizes derivative creation."
- Li Jin, founder of Atelier Ventures

How this plays out in culture



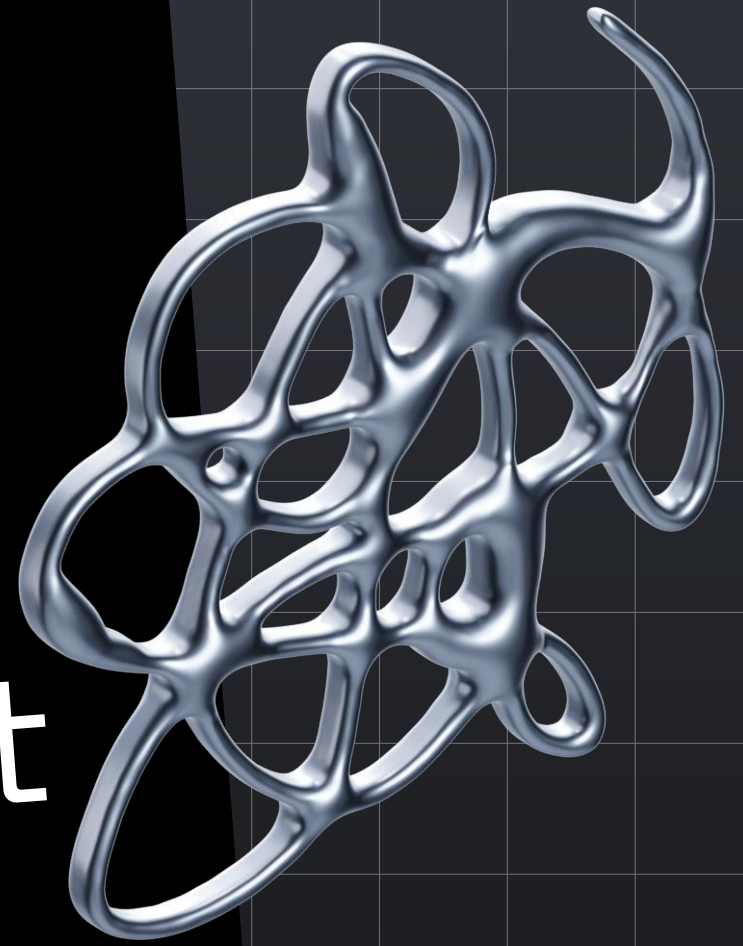
Nike's latest campaign with K-Pop group New Jeans combines Nike products with apparel from South Korean brands favoured by the group members.

WHAT DOES ALL

OF THIS MEAN

FOR BRANDS?

“The biggest risk to brands is becoming a slave to the algorithm and the platforms. You can be really led by what is performing and what is not performing. But then you’re looking backwards and not forwards and that could become a big risk.”



Gabrielle Kaegler, Brand Consultant

KEY TAKEAWAYS

RELINQUISH
CONTROL TO
CREATORS

Allow creators to produce content and conversation that is authentic to their interests – rather than your brand's – to engage and entertain their audiences.

PRIORITISE HUMAN
CREATIVITY OVER
VIRALITY

AI tools will soon replace high-reach influencers in creating viral, product-pushing social posts. Prioritise creators who can actually create.

MEET THE
AUDIENCE WHERE
THEY ARE; DON'T
PUT YOUR EGGS IN
ONE BASKET

People still want IRL. People still talk about cool events, and parties they've been to. No one remembers an IG ad which made them buy another pair of trainers they don't need.

STORY FIRST,
PLATFORM SECOND

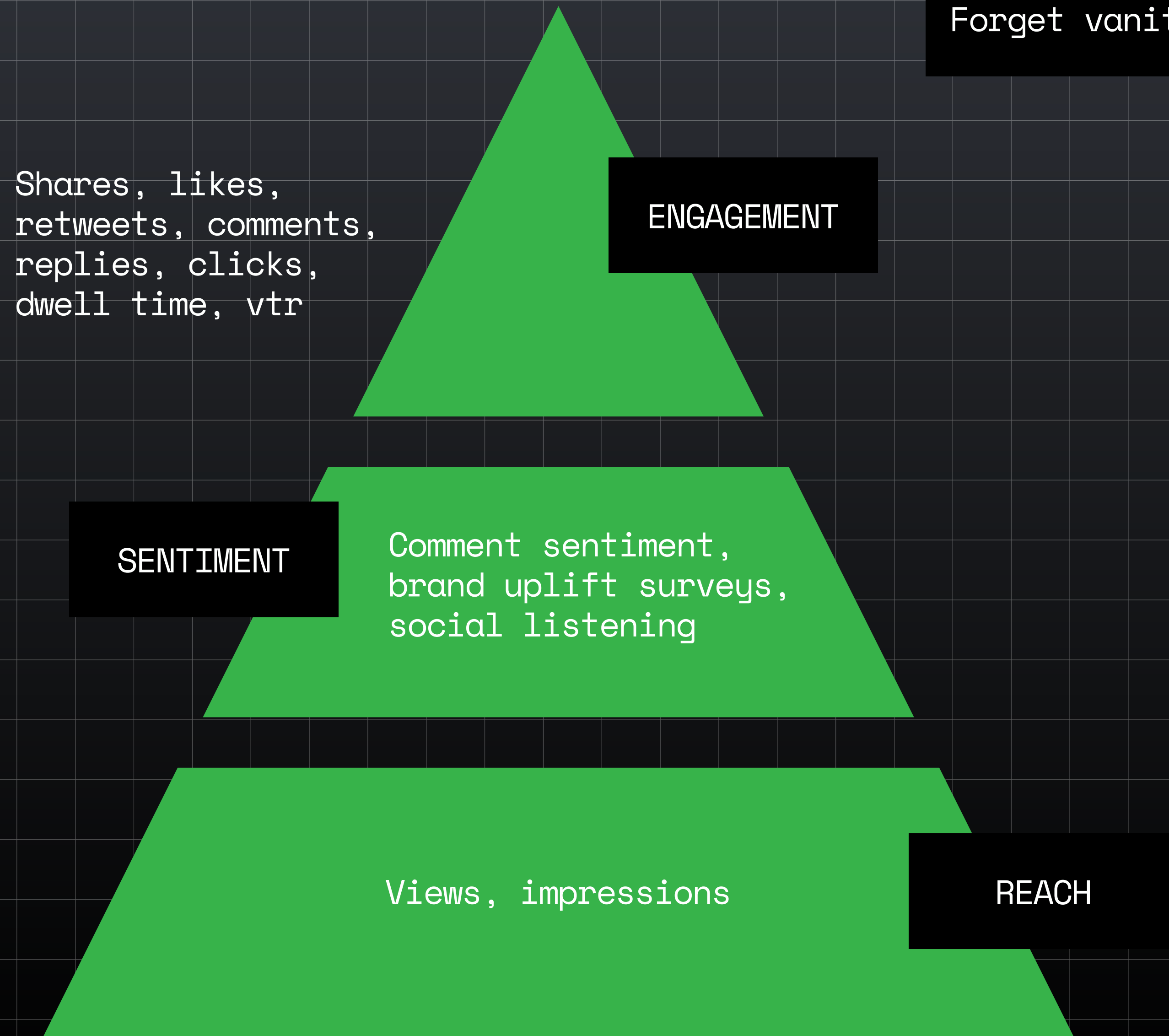
Over-reliance on platforms has put brands and the creators at the mercy of their updates. Focus on the quality of storytelling, what the audience can take away or what you're contributing to a conversation. Then figure out the formats and platforms best suited to it.

QUESTION THE
HYPE

Don't get caught up in the hype. Be strategic and question the value of what you're making.



THE METRICS NEED TO CHANGE



Forget vanity metrics, emotional resonance creates memorability

Currently, many boards get subjected to a gauntlet of meaningless metrics, whether impressions, likes, retweets or other engagement measures, that don't tell them anything about the number that matters: conversion rates and sales. Our research shows that 76% of CEOs are disinterested in retweets, while likes and impressions fare little better in their eyes. (Forbes, 2021)

BIG PICTURE THINKING

SOCIAL MEDIA AS PART OF A WIDER
TAPESTRY OF BRAND TOUCH POINTS
WITH A NEW FOUND WEIGHT.

IRL EVENTS

PR

PARTNERSHIP

TIKTOK

YOUTUBE

OOH CAMPAIGN

ONLINE

How this plays out in culture

"Brand communities that are run by the members rather than the brand result in higher levels of participation and commitment"
(Journal of Business Research, 2020)

01.



SSENSE SPEAK THE LANGUAGE OF THE INTERNET

Reactive and quick to produce Ssense join in on viral memes, like animorphs fitting their products into culture in a genuine, and humorous way.

02.



GUCCI RETHINK AD FORMATS

Moving away from the gloss of traditional ad formats, Gucci used AW23 fashion show coverage as TikTok ads.



03.



HILTON HOTELS GO LONG-FORM WITH 10 MINUTE TIKTOK ADS

"The ad feels like a Hilton-centric TikTok FYP. The commercial splices together commentary-style videos, comedy skits, reaction videos and even a remix to cater to the short-form video app."
(Centennial Beauty, 2023)

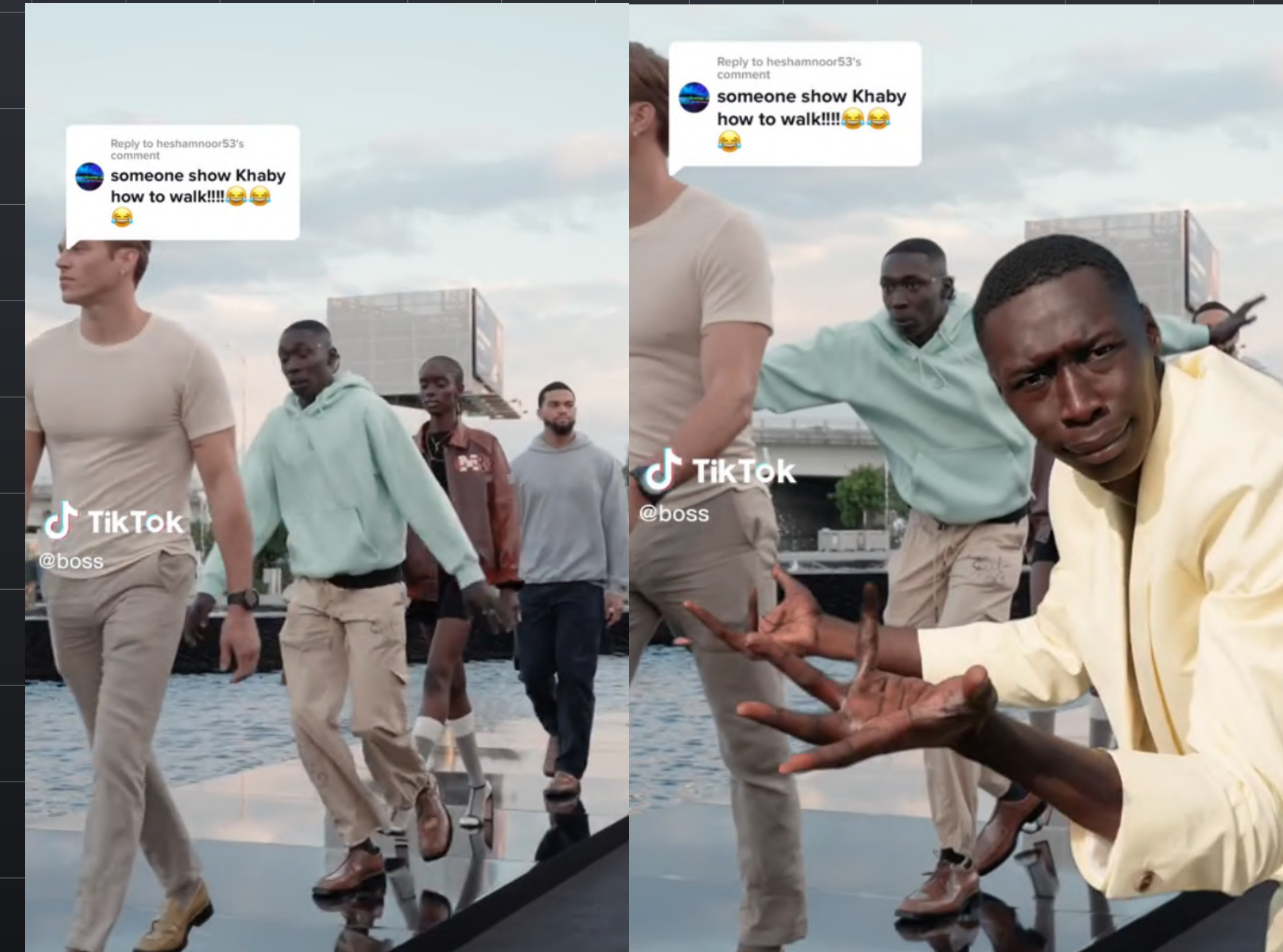
How this plays out in culture



04.

SHITPOSTING WORKS WITH LULULEMON

Lululemon jumped on a meme trend by recommending their products for a meme... In this case, [recommending products for capybaras](#) based on the internet's obsession with capybaras. It's now one of their best performing videos.



05.

FASHION FAILS RULE WITH HUGO BOSS

BOSS posted a runway rehearsal 'fail' of Khaby Lama nearly tripping over and then [video responded to a comment](#) showing how he perfected the walk on the actual runway. The actual fail video unsurprisingly performed better, but this is a good example of follow-up content that continues the narrative.

WORDS OF WISDOM FROM DAZED'S HATTI REX

X



Hatti Rex

EVOLVE YOUR SOCIAL STRATEGY REGULARLY

"Brands need to be switching their strategy to accommodate new platform changes as soon as they happen. It's not about getting it right the first time because that would be impressive but impossible but more to get the algorithm to favour boosting your content over the competitor who might be lagging slightly. Experiment with the new features as soon as possible, see what works and then build from there."

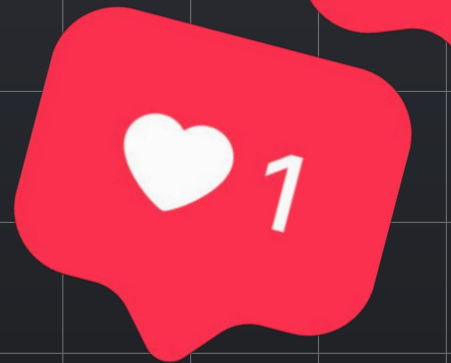
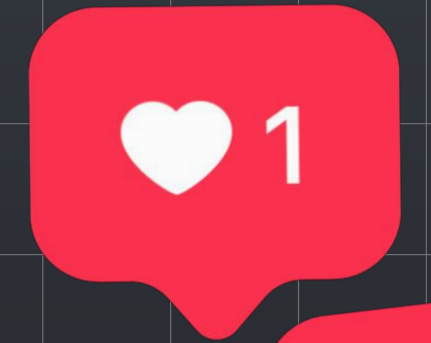
UTILISE NEW SOCIAL MEDIA FEATURES 02.

"The accounts utilising new social media features will always see their engagement boosted across other features of the platform. The more you experiment and lean into the changes, the more the platforms will reward you back. After all, the overlords need to push good examples of their latest whim being used correctly to coax the rest of the users to play good."

LO-FI, SHORT FORM TIKTOK VIDEO RULES RIGHT NOW

"Whilst TikTok is smashing it through capturing the attention of Gen Z with short form video, their strict community guidelines and prioritisation of self-shot video has homogenised the style of content that works on there, which can often limit creativity and the topics considered. The brands that work best on TikTok are the ones that jump in on trends early. Don't be afraid to chuck out anything that isn't working in favour of trying something new."

01.



03.

BRANDS QUESTION'S ANSWERED BY HATTI

How can you prove to your bosses that it's not always about the numbers and reach and be able to try different formats that don't necessarily always perform well?

DANIELLE COYLE
CREATIVE LEAD
BURBERRY

Experimenting with new formats is the key to finding out what works and what doesn't, I wouldn't necessarily spend time and resources on an idea that I know wouldn't do well but if a topic is especially important to be covered and it's important for the brand to be part of the conversation then it's usually worth it. If I was unsure about how well a new format would work I'd trial it for three posts, using key learnings to build into the following episodes. If it doesn't work on the third try, it's time to say goodbye.

What role will Snapchat play in the future of social media?

SONIKA PHAKEY
GLOBAL LIFESTYLE PARTNERSHIPS
TIKTOK

Hard to say as platforms are constantly changing (see: wtf is happening with Twitter and Instagram ever) but it will be interesting to see their impact as they're one of the most used social apps by Gen Z (and the [most used social platform in France](#)) and have been consistently growing in active users each quarter since 2019. Right now, Snapchat doesn't seem to be a priority for many brands but I think we'll see a lot more business incorporating the platform into their strategy because of its huge popularity with younger demographics. However as it's still primarily a social messaging app, it's hard to see how this would be fully executed.

How can you support mental health through social media?

LARISA KLITSINARI
DIRECTOR OF CONTENT
DE BEERS

For others, being mindful not to be triggering to your audience, incorporating warnings where possible and being mindful of the type of content you produce, make sure you're not accidentally perpetuating harmful ideologies and if you're reporting on these issues to provide nuance to the subject and properly fact check.

Do you know how young people shop on social media? Is it often the direct path to purchase?

ANNA ROSS
GLOBAL HEAD OF CREATIVE INSIGHT & TRENDS
KARLA OTTO

Not necessarily, Instagram just got rid of their shop so presumably it wasn't working or it would still be there. What I will say though is that algorithms across all platforms will prioritise content on-feed if you're utilising all features of the platform, including the shop, so it's good to try experimenting with these features even if they're not necessarily bringing in the big bucks.

How can brands behave more regionally through social media and not always be so London centric?

JASON MILLER
EMEA MARKETING LEAD
META

This needs to be at the forefront of all the content you produce, when in the concept stages of your project be sure to include voices from outside of London in everything you work on. The best way to do this is by looking for communities within these locations and seeing who they're platforming locally, who their friends are, what they're engaging with, even reaching out to them first hand for talent suggestions where possible. One of the most fun parts of working in social media is letting yourself go down an internet rabbit hole to uncover these key voices.



For more information about Dazed
Studio Insights please contact
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THE END

APPENDIX

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