

dentsu

Change and Opportunity

2023

Media Trends



Ten Trends for 2023

Even in a slowing economy, consumer behaviours in media evolve at pace. Everywhere we look we see both diversification and convergence - content platforms adding commerce, and commerce platforms adding ads and content - all trying to find new ways to engage and monetise their users.

We see a battle between the tech giants' walled garden ecosystems and the forces of interoperability, with marketers wanting to make platforms as accessible as possible through technologies like programmatic ad placement.

We also see the growing importance of content and quality, with the cream rising to the top. It is more important than ever for brands to create relevant messages that resonate with their audiences, and to act responsibly.

Economic uncertainty always brings out creativity in business and media. Previous cycles have launched or boosted radio, TV, and social media, and in the year to come we will likely see the emergence or acceleration of communication channels.

The need for cost saving and efficiency is also a driver of change, including the rise of ad-funded streaming - commerce sites looking to monetise further through ad sales - and a greater need to measure the attention consumers pay to advertising.

This year we have split the trends into 3 categories.



Media continues to evolve at pace with changing consumer behaviour and new technologies creating opportunities to find new pathways to growth. Every economic downturn has led to the creation or accelerated adoption of a new media, whether it be radio, TV or social media, and in the months ahead we should all keep an eye on what's next.

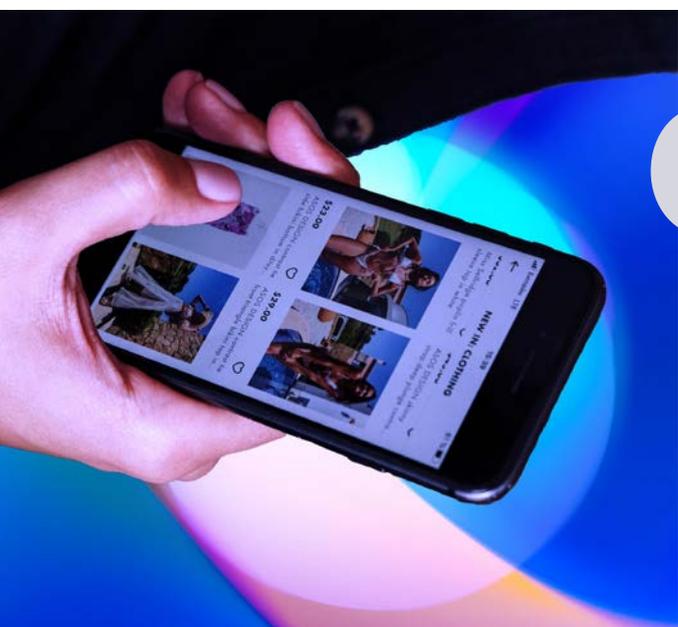
William Swayne

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01 Content

2023 brings changes in the content people consume, the ways they consume it, and how brands can increase the attention their own content attracts.



02 Commerce

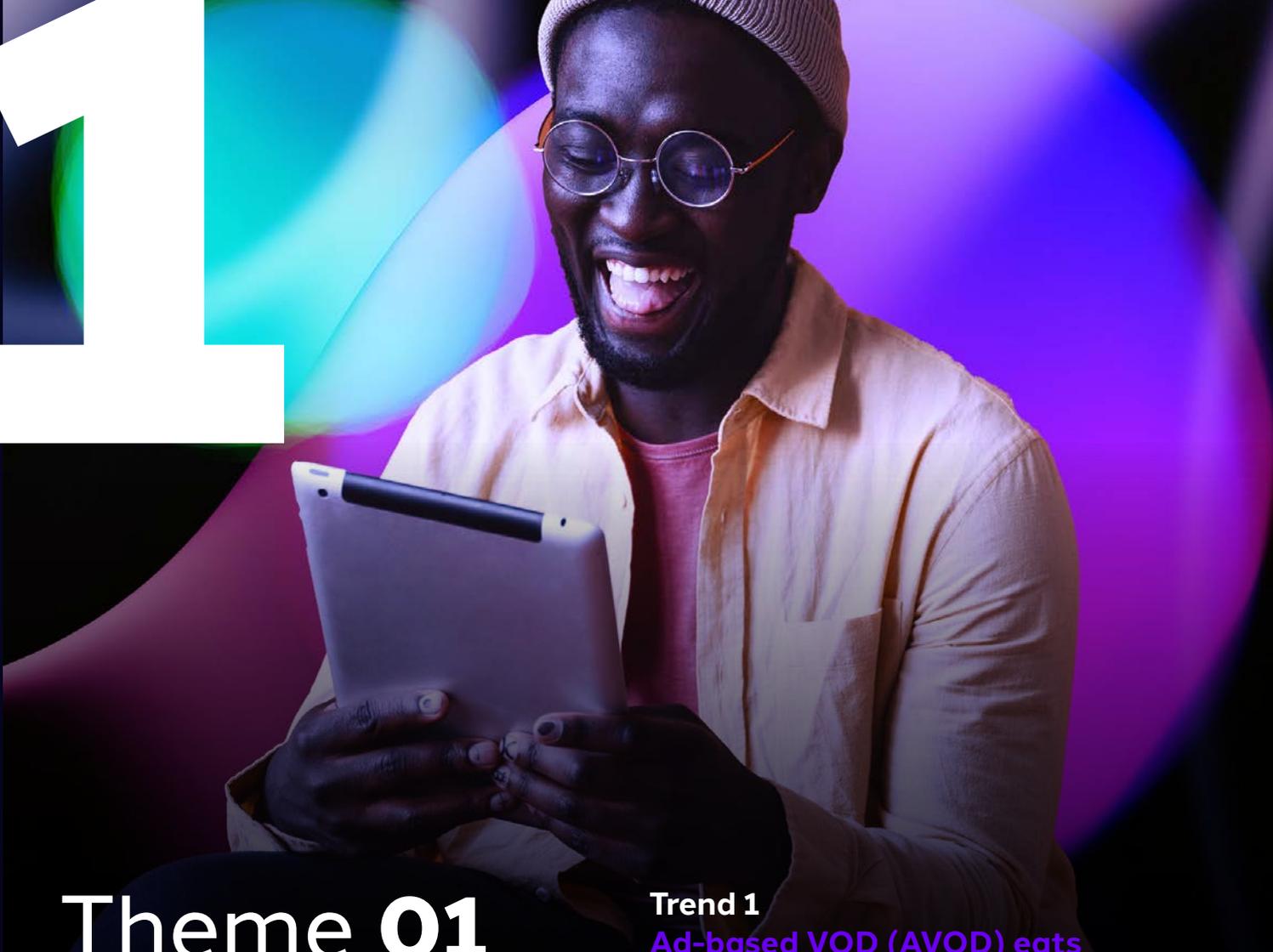
Digital commerce is evolving, including the growing importance of commerce sites in the advertising ecosystem, and the ways that brands can minimise the disruption caused by the deprecation of third-party cookies.



03 Community

Media can build community like never before, but the way this works is changing. Brands need to be aware of these changes to optimise their own performance.

1



Theme 01 Content

We spend much of our leisure time consuming content. The pandemic accelerated the shift to digital platforms, especially in video on demand (VOD) and gaming. We now see evolutions in these services and content forms, with streaming services keen to add advertising as a new revenue stream, consumers keen to reduce their subscription outgoings, and games being added to more and more services to increase engagement.

Everyone is looking for the audience's attention, including advertisers who now have new ways to quantify this across their ad spend.

This section looks at how content fights for our time, budgets, and mental availability. We will examine:

Trend 1

Ad-based VOD (AVOD) eats subscription VOD (SVOD)

Time spent with ad-funded video streaming platforms will overtake time spent with subscription channels, as both Netflix and Disney+ add ad-funded tiers.

Trend 2

Games everywhere

Gaming is increasingly mainstream, and sites and apps are adding games as a way to attract more users, more often.

Trend 3

Attention brings back the essence of advertising

Attention is an ad metric that correlates with effect, and more marketers are turning to this to see value for money and compare different channels.



01 / CONTENT

Trend 1

Ad-based VOD (AVOD) eats subscription VOD (SVOD)

With viewers under new economic constraints, streaming platforms competing in an increasingly expensive content arms race, and innovative technology enabling more targeted and creative messages, AVOD is set to enter a new age of domination over the video streaming category.

Trend 1 / AVOD eats SVOD

Leading streaming platforms build up their advertising capabilities

The two biggest premium streaming services, Disney+¹ and Netflix,² have announced they will launch ad-supported tiers by the end of 2022. One of Netflix's original tenets was the idea that viewers paid for the service, and in exchange saw the programming with no ads to interrupt them. Netflix's history is in DVD rental; when you watch a movie or episode on disk there are no ads, and so when it went to streaming it did not want to change this promise.

However, times are very different now. Netflix user numbers have stagnated, showing no growth for two quarters,³ and Disney now has more paid subscriptions through Disney+, Hulu, ESPN+ and Disney+ Hotstar.⁴ The introduction of ad-supported tiers could both increase the overall number of subscribers (a key metric for investors) and bring in additional revenues from advertisers keen to put their messages in Netflix content for the first time. Disney+'s own ad-funded tiers are also likely to bring in more revenue. Disney has decades of experience of knowing how to run ad-funded channels, and the technology and teams needed to make it work.

The cost explosion of content could dictate new market dynamics

Although more platforms open to advertising means more competition for advertiser dollars in the immediate future, the explosion of content cost could shrink the number of players on the longer term. New series such as HBO's *House of the Dragon* and Prime Video's *The Lord of the Rings: The Rings of Power* have reportedly broken cost records for single seasons in an attempt to lure and keep viewers on these platforms, but the bottom-line results of these investments are yet to be seen.

Streaming platforms are caught between the deteriorating economic situation which pushes cost-conscious households to reconsider their subscriptions to streaming services,⁵ hence the appeal of ad-funded programming and its promise of cheaper subscriptions and increasing costs of content licensing and

production to offer the exclusives needed to become the streaming service of choice. Forrester projects that the percent of streaming platforms' revenues from advertising will rise from 21% in 2020 to 38% in 2027.⁷

In this context, there is no guarantee that the massive move toward Free Ad-Supported TV (FAST) models will be enough for all platforms to keep up with the cost of doing business, which could lead to a wave of market concentration.

Technology opens new opportunities for creativity and targeting

Connected TV (CTV) advertising is also evolving. The growth of CTV means that advertising can potentially be targeted in a much more granular way to broadcast TV advertising, but also formats can be more innovative and interactive. It is possible to click on ads to send information to the user's phone, and to make shoppable ads, where people simply have to use their remote to buy from the screen.⁸

Amazon has announced that it will be introducing virtual product placement to some of its programming,⁹ using special effects techniques usually seen in movies to seamlessly insert brands into programmes post production. Examples might be a poster on a wall that two characters walk past, a beverage can or sauce bottle on a table while characters eat, or even a car parked in the street.

What Brands Can Do

- Explore new opportunities in the high-profile streaming channels. What can they bring to your plans in audiences, reach and outcomes?
- Look beyond traditional advertising. Greater commercialisation will also bring additional opportunities in product placement and ad-funded content.
- Capitalise on the multi-screen potential. Many streamers also have apps that can enable mobile activation.

Trend 1 / AVOD eats SVOD

Search

All

Live

Gaming

Laughter

Comedy



With the introduction of ad-supported tiers by leading streaming services, AVOD is set to enter a new age of domination over the video streaming category. This cost-effective approach is a big motivation to investors and viewers alike, in a climate where the cost of content is skyrocketing. Technology is also opening new opportunities for creativity and targeted advertising. For brands, this shift presents a range of new possibilities for reaching consumers.

Sanjay Nazerali

Global Client and Brand President,
dentsu X



01 / CONTENT

Trend 2

Games everywhere

With 3.2bn estimated video game players across the world in 2022,¹⁰ and 75% of US homes containing a gamer,¹¹ gaming is now a mainstream activity. This has not gone unnoticed by technology platforms and media outlets who are actively working to incorporate gaming elements into their offering as an audience attraction and stickiness factor.



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Trend 2 / Games Everywhere

Video <3 gaming

Netflix has always kept a close eye on gaming. The platform has developed several shows directly inspired by video games, and in January 2019 went as far as describing Fortnite as a bigger competitor than other streaming services.¹² It is then not surprising that Netflix started to integrate games both based on its titles, like *Stranger Things*, and other non-show-related games, like *Rival Pirates*.¹³ It has also started to include games on screen, making use of the interactivity available both online and on connected TVs. In April 2022, it introduced a month long interactive daily quiz show that was essentially an adaptation of the mobile game *Trivia Quest*.¹⁴

Gaming is also starting to invade TV. In June 2022, Samsung introduced an Xbox app for their smart TVs that allows viewers to play a selection of games without an Xbox. Users need to buy a controller to connect to their sets but can then play as if they have a console.¹⁵

Social platforms want their *Farmville* moment

Social apps are also turning to gaming content. Games were a part of the Facebook experience in the early days, with titles like *FarmVille* becoming popular with users for a few years and displayed in the feed until Facebook changed their algorithm. Now two leading mobile-first apps, Snapchat and TikTok, are introducing games as a way of engaging more users. TikTok has reportedly started to test HTML5 games within its app, creating a special tab in markets like Vietnam.¹⁶ As for Snapchat, Augmented Reality (AR) has long been a key part of its experience, and earlier this year the platform introduced a new AR lens that is actually a

game. *Ghost Phone* lets users hunt for ghosts in their own home, with goals and points to win, as they walk around.¹⁷ The gamification of lenses could make them potentially more engaging, shareable, and addictive.

Time is of the essence

Spotify is another platform that has added games in 2022. In July they bought *Heardle*, the music-based game that challenges players to identify a new song each day, playing more of the intro in each round.¹⁸ *Heardle* was inspired by the word game *Wordle*, which *The New York Times* (NYT) bought for a reported seven figure sum in January¹⁹ as a way to generate more visits to their site. As with the NYT's deal, the objective behind *Heardle* is to use gaming as a magnet to bring audiences into Spotify and encourage repeated usage even if they do not want to listen to music or podcasts, increasing the number of daily users and allowing Spotify to collect more first-party user data. Both games were snatched and integrated in the NYT and Spotify ecosystems very quickly to capitalise on the strong momentum around them.

What Brands Can Do

- Investigate gaming as a channel and content form. What level of involvement is most appropriate for your consumers?
- Test new approaches using established technology partners, extending current campaigns to new platforms.
- Ideate around on-site content. Can games help to explain innovations, sustainability, or other initiatives effectively?

Trend 2 / Games Everywhere



In 2023, Gaming is a mainstream platform for our clients to reach the people buying their products.

Gaming is no longer purely for teen boys in dark rooms. Look at the stratospheric rise in popularity of Candy Crush – proving there’s a gamer in every one of us, from primary school kids to retired grandparents.

Our recent research with GWI helps our clients to understand which gaming audience is right for them.

Fiona Lloyd

Global Client and Brand President,
Carat



01 / CONTENT

Trend 3

Attention brings back the essence of advertising

As brands look beyond metrics of reach and viewability to understand what content truly engages consumers, they turn toward attention metrics to measure the level at which the audience takes notice of their messages, across formats and platforms.

Trend 3 / Attention brings back the essence of advertising

The need for new attention metrics

The proliferation of channels and devices has made it increasingly important to understand what people are paying attention to, whether it be ads or content. In recent years, platforms like TikTok and YouTube have optimised their algorithms by showing users personalised video feeds based on their interests to improve their experience, keep them engaged longer, and make them return more often.

Advertise comes from Latin *ad* (towards) + *vertere* (to turn), so by definition advertising is about what people turn towards. It is therefore essential that as advertisers try to capture attention in a very crowded media marketplace, they move beyond more simple metrics like impressions and viewability to attention metrics.

Technology opens new measurement possibilities...

Advertisers do not have the luxury of the sort of analytics that platforms have, but technology has made it easier to measure the attention paid to advertising. Companies like Lumen can now use the cameras in laptops, phones, and tablets to see eye movements when a user is on a page, and see what users are focusing on and for how long.²⁰ It is possible to use similar techniques to analyse advertising in media like TV, Out-of-Home (OOH), and audio, potentially creating a common attention metric to assess different channels and placements against each other.

The advent of digital media brought great understanding of how performance-based ads work, from exposure through to sales, and the study of attention helps marketers understand the effectiveness of more brand-based campaigns, because studies show²¹ there is a high correlation between ads that deliver attention and ads that deliver business impact.

...and new ways to drive media investment.

Studies on attention can help platforms to understand their inventory better, help marketers to understand more about what is working, and use this knowledge to make advertising work better.

Dentsu has invested in its Attention Economy programme since 2018 to create attention-based planning, measuring, and buying metrics and models for clients to use. The research has proved that attention increases both the ability for consumers to recall the ads and their likelihood to buy the brands.

In addition, we have been able to build CPMs (cost per thousand impressions) based on an effective attentive second (CPM EAS) for planning purposes, and a powerful attention predictive model that can be applied to advertisers' buying and measurement needs.

For example, it is now possible to spot hidden gems - formats that may deliver a lot more attention for other placements that cost the same amount or even more. In a time of high media inflation, where some channels like linear TV are seeing costs rise by 20% in some markets, understanding attention can allow marketers to get better value for their campaigns, even if they may be getting fewer impressions.

What Brands Can Do

- Develop plans to measure the attention advertising is generating and integrate into your planning and trading models.
- Learn to compare different media and platforms with similar attention metrics.
- Hunt for hidden gems - unloved formats and placements that could add efficiency to a schedule, particularly in a time of high inflation.

Trend 3 / Attention Brings Back The
Essence of Advertising



Attention helps us to understand how advertising works, beyond the immediate performance metrics. Attention is the foundation of building brands through a performance mindset. Without attention, all our other efforts are wasted. With attention, we can move towards more valuable behavioural outcomes. Our Attention Economy project raises the floor for all media investment and allows creativity to shine.

Amanda Morrissey

Global Client and Brand President,
iProspect



Theme 02

Commerce

Commerce is in a time of great convergence and diversification. Media platforms, especially social media and video, are trying to become sales platforms, while commerce sites are building up their media businesses. Apps that might be thought of as single use like messaging apps or even taxi apps are diversifying to try to appeal to more people on more occasions, while brands are trying to make sure they are still able to speak to consumers and potential consumers effectively while respecting their privacy.

This section helps explain how to navigate these conflicting forces.

In this section we will look at:

Trend 4

From Going Shopping to Always Shopping

Commerce is available on more and more digital channels, making shopping more of an always on state of mind, rather than a conscious activity.

Trend 5

Retail media shakes up adland

Retail Media - ads on retailer sites - offer advertisers a signed-in audience, close to the point of purchase, and is generating billions for sites.

Trend 6

The Rise of the Super Apps

In a surge of diversification, apps we may think of as single use are adding extra features and trying to become more essential to their users.

Trend 7

No way back for third-party cookies

Marketers and agencies are now much more optimistic about marketing without third-party cookies, thanks to better understanding of data and new technology.



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Trend 4

From Going Shopping to Always Shopping

Commerce has become so omnipresent on screens and in apps that people are no longer *going shopping* as a conscious activity but are *always shopping* - surrounded by moments where they can spontaneously move from inspiration to transaction.



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Trend 4 / From Going Shopping to Always Shopping

In previous years we have written about contextual commerce where commerce has moved from specific retail sites to the content sites and feeds where people spend the bulk of their digital media time. We will see later how commerce sites are themselves changing, becoming media sites where people can not only buy, but also be targeted with relevant messages.

Shopping permeates social and messaging platforms

2022 has seen social commerce become more mainstream, with more brands experimenting and creating stores within apps like Facebook, Instagram, Snapchat, and TikTok. Grand View Research values the global social commerce market size at \$584.91bn in 2021 and projects the growth at a compound annual growth rate (CAGR) of 30.8% from 2022 to 2030, across B2C, B2B, and C2C, where consumers buy directly from each other.²²

We also see Western platforms experimenting with adding commerce to their messaging platforms. In August 2022, Meta launched its first test in India with the creation of JioMart on WhatsApp, a collaboration with Reliance Retail and Jio Platforms. Users can send a message to the JioMart WhatsApp account, browse a selection of products in a carousel, add what they need to their basket, and then check out.²³

Finally, a native TV experience

Commerce is also coming to TV. The growth in penetration of smart TVs means that for many homes, TV now has the potential to be shoppable within one device, rather than relying on a secondary technology, like scanning a QR code, visiting an on-screen URL, or just picking up the phone. In June, Roku announced a test with Walmart where users could see products in

ads, and then shop by using the remote control, using their existing Roku account details, including payment and delivery address.²⁴

This technology is still in its infancy, but if tests like these are successful, and if penetration of smart TVs continues to rise and streaming platforms continue to open to advertising-based models, we should see this technology proliferate, with, for example, buttons at the end of episodes allowing viewers to shop the show.

The interoperability conundrum intensifies

The coming problem with the expansion of this technology is the comparative interoperability of the platforms if social media buyers need different shopping baskets on every service, even though the products on sale are likely to be the same. This is creating a very siloed experience that requires brands to create bespoke stores for each platform (rather than just have one online store). As commerce becomes ever more present in every service people use, there will be a need for simplification of the process, otherwise, brands will have to choose to have stores on some platforms and leave others for promotion or more brand-based messages.

What Brands Can Do

- Test and learn to understand which of the wealth of new platforms are most effective.
- Create native stores on platforms to make the experience even more frictionless for consumers.
- Develop a spontaneous strategy - dayparts, prices and even products that drive quick, frictionless buying.

**Trend 4 / From Going Shopping to
Always Shopping**



It's part of people's innate nature to be curious and want to experience new things.

And today's shoppable world enables us all to be curious and experience new things like never before. New technology makes it easier to move from interest to purchase more quickly -

We're still in the early stages of this kind of tech, behaviour change and adaption. However, the opportunity this presents for our clients is one that brings them into people's homes, devices, and lives; in an interactive way and at a speed previously unmatched.

Fiona Lloyd

Global Client and Brand President,
Carat



02 / COMMERCE

Trend 5

Retail media shakes up adland

eMarketer projects retail media spend to hit \$61.15bn in 2024 in the US alone, accounting for nearly 20% of digital ad spend.²⁵ Armed with an unrivalled wealth of first-party shopper data, platforms like Amazon, Walmart, and Deliveroo are turning themselves into compelling advertising options for brands.



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Trend 5 / Retail media shakes up adland

Amazon gets serious about advertising

Retail media is advertising using retailers' own omnichannel properties and data, leveraging their ecosystems to create a brand-safe medium to advertise to people who may already be in the shopping mindset, with the tools to track attribution effectively.

The most successful proponent of retail media is Amazon, whose advertising revenues have grown enormously in the past five years. Most recently, Amazon reported nearly \$9bn for the three months ending June 2022, an increase of 18% year on year,²⁶ making it one of the biggest advertising platforms, even though retail media is a side line to Amazon's main business.

Advertising reportedly gives Amazon very high margins,²⁷ much higher than commerce. Advertisers benefit from access to Amazon's data on their own logged-in customers, including address and purchase history, the ability to target shoppers searching for specific products and categories, and the ability to track the path to purchase, when users are likely to buy within minutes of being exposed to an ad, and without travelling to multiple sites.

The first-party data advantage

Shopping data gives retail media sites a big advantage over more traditional publishers and even newer social media apps and content sites that simply do not have as much data on their users, especially with the ongoing deprecation of third-party cookies as targeting and measurement technology within online campaigns.

Many retailers and fulfilment companies are now introducing their own advertising opportunities,

including traditional retailers like Walmart that reported 30% growth in ad revenues in August 2022,²⁸ newer eCommerce players like Instacart,²⁹ delivery and mobility apps like Uber,³⁰ Lyft,³¹ and Deliveroo,³² and even hotels like Marriott.³³

A new ad giant in the making?

Perhaps the elephant in the room is Apple. While it is not a traditional retail player, its App Store is a hugely profitable sales driver, and this is also a growing advertising platform for anything from apps to lifestyle products. While Apple has been reducing the acceptance of third-party cookies in apps on its devices, it still collects massive amounts of first-party data on its own users, including their interests and activities.

If Apple wanted to be a big ad platform it could become one, and some recent cues may indicate a future ambition in that domain. In September 2022, the *Financial Times* reported Apple was recruiting for many advertising roles which would double the size of its team to nearly 500 people.³⁴

What Brands Can Do

- Test retail media sites - if you are not already - to understand how your performance differs from performance on traditional platforms and incorporate their data into media planning.
- Try a variety of retail site categories. What works best for advertising different sorts of products?
- Investigate becoming a media owner. Do your own sites suit ads for non-competitive products?

Trend 5 / Retail Media Shakes Up Adland



Commerce is today more than ever at the heart of convergence and business transformation: Technology, Data, Culture, Creativity and Media all converge into the new Commerce Ecosystem and transform the way we discover and buy products.

To win in this fast-paced environment requires to move from a disconnected to a connected commerce practice, across all the organization, throughout the full consumer journey: Everything Digital becomes shoppable, and all shopping are becoming digitally augmented. Navigating an EVER-evolving retail landscape requires a NEW, multidisciplinary approach, fully integrated into your marketing and media operations.

Amanda Morrissey

Global Client and Brand President,
iProspect



02 / COMMERCE

Trend 6

The Rise of the Super Apps

In the last decade, the tech titans started to diversify, building ecosystems that were capable of catering to their users' needs across a wide range of services. Google ceased to be just a search engine, Amazon ceased to be just a store, Facebook added more features to its core services, etc. Before long, all were offering video, games, commerce and community features.

Trend 6 / The Rise of the Super Apps

Asia leads the way

We are now seeing a similar diversification among some apps, following the Asian model of super apps. A super app combines various features - typically messaging, commerce, booking and payments - to provide a fuller service to its users and remove the need to download lots of specialist apps, but instead give one app, one sign in, and one user experience.

WeChat, which started off as a messaging app, is a good example of a super app. It has expanded its focus from messaging to video, content, entertainment, commerce and more. Other apps are integrated into it as mini apps, meaning you can request a taxi via Didi while you are within the WeChat app. By diversifying and adding more features it has become an essential life tool, providing help throughout the day, whatever its users want to do. Other popular super apps around Asia include AliPay, OMNi and Grab.

Diversification through concentration

While Western-owned apps do not seem to have quite this scale of ambition, we are seeing several add more features to extend the scope of what they offer. TikTok is a classic case in point. It has been evolving from a video app to include commerce and live video, and its parent company has recently trademarked TikTok Music in several markets including the United States,³⁵ which could mean it could prepare a music service that could compete directly with Spotify and Apple Music. TikTok Music would let users create and share playlists and use the app as a music player without watching videos. TikTok has been hugely influential in music over the past four years, generating billions of streams for hundreds of songs, and launching the careers of many musicians, so this would be a logical extension. In some respects, this diversification is reminiscent of the classic Netflix quote from 2013: "The goal is to become HBO faster than HBO can become us."³⁶

Another example is Uber's aim to be a much broader travel and mobility app, rather than just a ride-share

app. In 2015, it added Uber Eats food delivery using the same logistics network and has since expanded into rapid grocery delivery through a series of partnerships with retailers. In August 2022, it launched Uber Travel in the UK, adding the ability to book other travel services, including buses and trains, all within the same master app.³⁷

Similarly, Vodafone has turned its Turkish app, Vodafone Yanimda, into a travel portal offering the ability to book flights, hotels, tours and cruises from hundreds of partners. Users do not need to be Vodafone customers, but additional perks exist for Vodafone Red members.³⁸

Social Media OGs roll out features to become more central to our lives

When Elon Musk first mentioned buying Twitter, he reportedly argued that it had the potential to become a super app and suggested payments as a feature to add.³⁹ Twitter has also been adding audio, through its Spaces live audio channels,⁴⁰ and, most recently, podcasts.⁴¹ Again, this broadens the appeal of the app, while keeping the original DNA of being the world's Town Hall.

Facebook has also been quietly adding new features to WhatsApp, making it less of a one-to-one messaging app and more of a community tool with the ability to make even bigger groups and to like and react to other people's messages. It is also experimenting with payments and commerce, for example, users can now make payments for friends or businesses in India.⁴²

What Brands Can Do

- Create a list of new super apps that could be good partners for data, commerce, and advertising.
- Take inspiration. Is there a similar diversification strategy that could also work for your owned channels?

Trend 6 / The Rise of the Super Apps



With technology ever-evolving, it's no surprise that the "tech titans" are diversifying their platforms to maintain their grip on the market. Expanding services to include video, games, commerce, and community features allows users to have a one-stop shop for all their needs, rather than trying to keep up with different specialist apps. Super apps make life simpler for consumers, motivating them to do what they want as easily as possible.

Sanjay Nazerali

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02 / COMMERCE

Trend 7

No way back for third-party cookies

With the ongoing deprecation of third-party cookies, the last twelve months have been particularly busy for brands as they face critical technology decisions with deep ramifications throughout their businesses. The overall picture is one of optimism, but advertisers need to test and refine to make sure they find the solutions that will work best for them.

Trend 7 / No way back for third-party cookies

A transition to the cookieless world firmly in motion

The move to a cookieless future feels less like a specific moment of change and more something that is happening over time as marketers test and adapt. Google's decision to delay the deprecation of third-party cookies in Chrome by another year in July 2022⁴³ gives the industry more time to adapt, but with some sources estimating that as much as 50% of the web⁴⁴ is now already cookie-free on browsers like Safari and Firefox, not to mention within iOS apps. Moreover, Gartner predicts that by the end of 2024, 75% of the world's population will have its personal data protected under modern privacy regulations.⁴⁵ Google's role as an arbiter of change is less pivotal than it was.

A multiple-path journey

Brands and publishers are now much more active in collecting, processing, and scaling first-party data, including through new value- and consent-based loyalty programmes. Marketers are also finding new ways to blend diverse data sources to create ID Graphs that allow brands' own data to be expanded without having to use third-party data.

One way of doing this is through Clean Room technology. Clean rooms securely blend first-party data from two sources, typically brands and publishers, to find the matches and then target existing customers on publisher sites without either side being able to see what matching has taken place. One analogy is the concept of escrow in finance - a safe space for something to be stored that neither party can independently access.

Another solution is the development of Universal IDs (UIDs). AdTech companies including The Trade Desk

have created their own UIDs to allow them to identify users across multiple websites and devices, using open source technology that other companies can use and build into their own systems.⁴⁶

There is also rising interest in new forms of contextual targeting, i.e., targeting ads based on the context of the page rather than observed features of the individual being targeted. Google is currently testing its own initiative Topics where 350 topics will be identified and each website categorised accordingly.⁴⁷ Other solutions look at typical traffic flows, for example, people who arrive at a target page have often previously visited different sorts of pages, and then target based on that.

The local factor

Brands need to be aware that while digital media and technologies may appear to be global in their scope, legislation varies considerably across borders, so it is essential to work with local partners who are compliant where advertising takes place. There may well be trade-offs between the potential benefit of advertising and the cost of adding markets to a plan, based on the complexity of operating.

What Brands Can Do

- Continue to prioritise first-party data.
- Explore new resources, partnerships and technologies to reduce any impact from coming changes.
- Develop a new hybrid measurement model, combining different techniques and data sources to be less reliant on individual partners.

B



Theme 03

Community

Community is more important than ever in a rapidly changing world. With so much competition for time and engagement, the rules are constantly evolving. It is becoming more necessary to develop strategies to foster community engagement, including limiting access to increase suspense, appealing to people's better natures, and developing content truly adapted to new social platforms.

This section explores ways to navigate a rapidly evolving landscape and build greater attachment. We will look at:

Trend 8

Going Live goes a long way

Streaming channels, online communities, and this year's hottest social media app are all learning the value of doing something live.

Trend 9

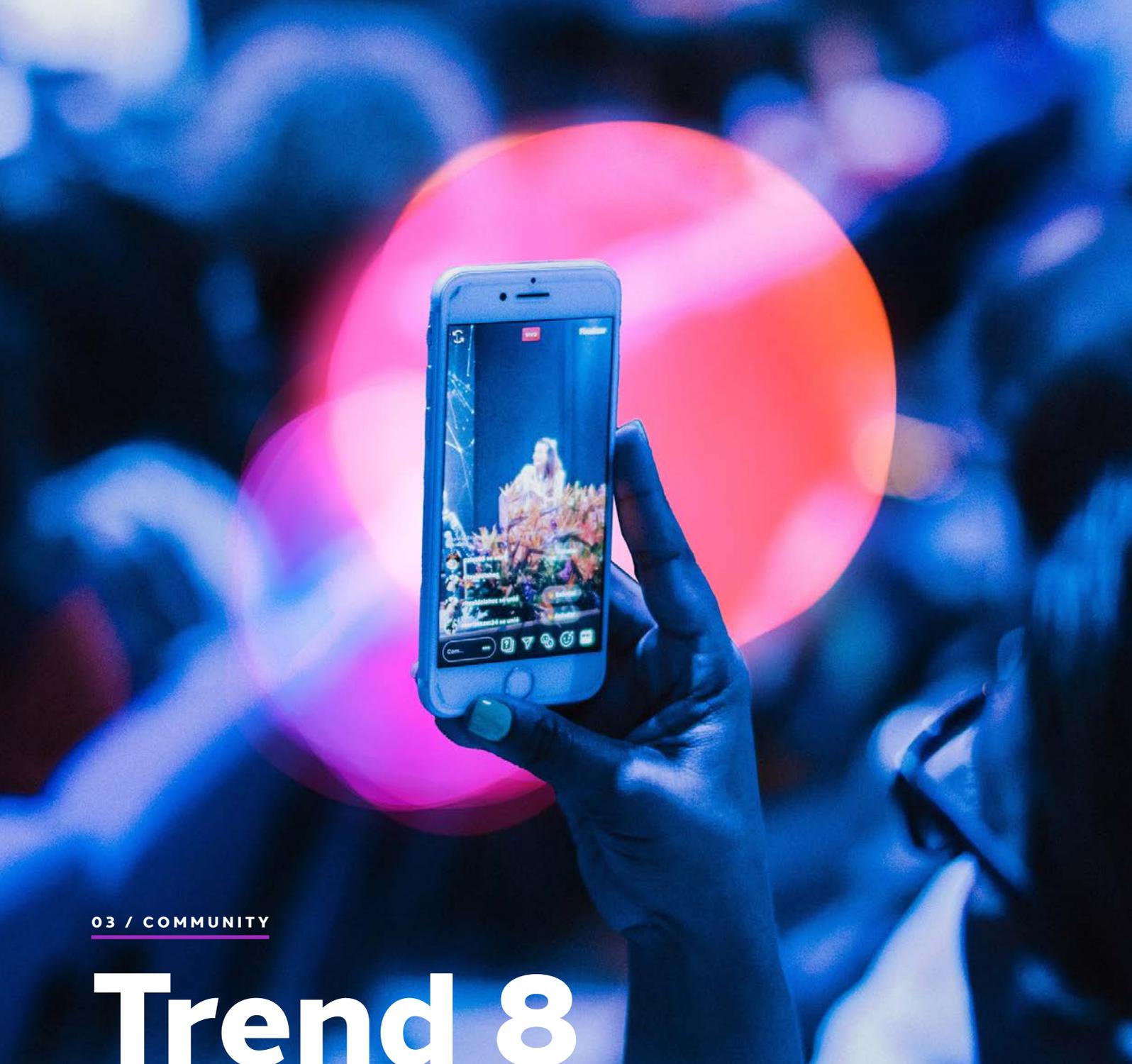
Responsibility Takes Centre Stage

Brands are building communities around their efforts to make the world a better place, aided by new platforms like WeAre8.

Trend 10

Social algorithms give users what they don't know they want

Social media is changing rapidly, focusing more on great content than who follows whom. Could search be next to be forced to change?



03 / COMMUNITY

Trend 8

Going Live goes a long way

One of the longstanding central promises of digital media has been to allow people to access and enjoy content on demand. However, some platforms are now realising the unmatched power of communal experiences and starting to invest in live or nearly live events to engage communities.



03 / COMMUNITY

Trend 8 / Going Live goes a long way

Binge watching shows its limits

One of the biggest changes seen in the streaming platforms is their experimentation around staggered releasing. Netflix came to popularity through box sets like *Breaking Bad*, where members could receive the entire series, either on DVD or streamed, and then binge the episodes in a few days. This strategy has continued, but recently there seems to have been a change in strategy, possibly driven by the success of shows on other platforms like *Euphoria*,⁴⁸ *House of The Dragon*,⁴⁹ and *The Lord of the Rings: The Rings of Power*,⁵⁰ which release weekly episodes and give the fans time to anticipate the next episodes and share memes and theories in the meantime. Netflix released the latest season of *Stranger Things* in two drops,⁵¹ and will be experimenting further including Guillermo del Toro's *Cabinet of Curiosities* which will release over a four-day period.⁵²

Live brings communities together

Fans have proven their affinity to congregate around physical or virtual events. Knowing this, podcasts have started to feature live events and even tours, so that fans who enjoy listening on their own can share a collective experience with others. The British podcast *Parenting Hell* is planning to play the O2 in London,⁵³ which has a capacity of 20,000 and is more often used to host gigs.

Live viewing is one of the appeals of video game streaming services like Twitch, where viewers log on to watch other people play games, to both learn new tricks and enjoy the sense of community. Since the pandemic, Twitch's most popular genre of streaming is Just Chatting⁵⁴ where personalities either talk to themselves or the community without playing a game at all.

Many of the pandemic virtual experiences have been discontinued, but McDonald's experimented with an in-app Summer Camp this year, creating a calendar of live events and offers their fans in the US could enjoy over 27 days in July 2022, including exclusive Sunday in-app performances from stars like Kid Cudi.⁵⁵

Contrasted success for live commerce

One segment of live video that has not yet taken off in the West is live commerce. While this is hugely popular in Asia, accounting for more than 10% of online sales in 2021,⁵⁶ attempts to introduce it in the West have not yet succeeded, as witnessed by both TikTok⁵⁷ and Facebook⁵⁸ scaling back services in recent months. Live commerce may be succeeding, however, in very tight niches. The app Whatnot focusses on collectables like trading cards and action figures from popular fandoms and has recently started to expand its output.

This year's hottest social media app, BeReal,⁶⁰ relies of a sense of live community to create a buzz. The app asks its users to take a photo - both front facing and selfie - within two minutes of an alert, so that they can show their friends the reality of their lives at that precise moment. It's a very clever idea, and one which is being integrated into other apps, including TikTok.⁶¹

What Brands Can Do

- Develop a live strategy to take advantage of moments and scarcity.
- Investigate partnerships with entities with complimentary communities. Can you be part of their events?

Trend 8 / Going Live goes a long way



An evolution is underway in how brands harness the power of community building; shifting focus from 'lifetime value' to the commercial impact an individual has on the community. Impassioned people have always coalesced around causes, brands, products or even entertainment titles.

The intersection of brand and performance media, designed as community architecture, has the power to generate a flywheel effect - building brands via algorithm-hooking content and deploying performance intelligently to harness community effects. Tactics including exclusivity and tiered rewards, or access inject community-driven energy - and shift focus from individual purchasing power to commercial impact on others.

Amanda Morrissey

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03 / COMMUNITY

Trend 9

Responsibility Takes Centre Stage

Brands are showing more responsibility over how their actions can impact society by trying to both create and reflect a more fair and diverse world, but also measuring the social and environmental impacts of their campaigns.

Trend 9 / Responsibility Takes Centre Stage

Values and Value go hand-in-hand

While some may take the point of view that concern about societal issues can be bad for business, research shows that the public is on board with these principles. The world is becoming more diverse, and people are growing up with a greater appreciation of issues like identity and the environment.

According to the UK's National Centre for Social Research, in 2022 a majority of the nation's public agree with liberal positions on issues like racial equality, immigration and sexual identity and the trend is towards more inclusivity.⁶²

Similarly, in Kantar's 2022 Sustainability Sector Index, 97% of consumers across 32 countries report they want to live a sustainable lifestyle, and almost half (47%) globally say they have stopped buying certain products/services because of their impact on the environment or society.⁶³ Brands can differentiate themselves and build brand equity by expressing points of view that many of their customers agree with and setting an example with their own actions and campaigns.

The pandemic showed that brands could get kudos and respect from their customers by acting in an emotionally intelligent way, both showing they understood what their customers were experiencing, and taking positive steps or providing tools and resources (or even humour) to help people get through a difficult time.

In order to face new challenges, brands are forming communities to connect people and organisations to resonate with a single purpose, not just serving their own interests, but serving society, too. It is easy to voice support, but brands now need to act.

New ways of doing business emerge

The rise in the cost of living is another example of a global event that brands can use to show what their priorities are, and how they can authentically become a part of their customers' lives. We are starting to see cooperation across industries around issues, and the economic situation is also increasing the incentive

to live sustainably both for consumers - for example, buying and selling pre-lived clothing - and companies - for example, starting to charge online shoppers to return unwanted items.

Earlier this year outdoor brand Patagonia took the next logical step in its journey to sustainability, having previously achieved B Corp status⁶⁴ and set up the infrastructure to allow its customers to repair and even resell their products, by revealing that the founder was giving the company away to a charitable trust dedicated to fighting climate change.⁶⁵ The brand shows its commitment by not just talking about what it should do, but taking bold, unprecedented actions.

The entire supply chain is going greener

It is easy to think of consumer brands that demonstrate sustainability and responsibility, but we are now starting to see platforms that do this, too. WeAre8 is a mobile social content app created with a stated purpose to make its users' lives better by giving them a feed of interesting, positive and uplifting stories, and even rewarding them for watching the adverts from its partners.

Similarly, The GoodNet is a network of media sites with high quality journalism and content that are aiming to play a positive role in the world, typically sites that focus on being greener, fairer, or healthier.

At dentsu, we are helping clients to cut carbon in their campaigns through our carbon calculators, which can integrate into our planning system so our clients have an understanding of the carbon impact of one media plan versus another.

What Brands Can Do

- Measure the carbon impact of campaigns and understand the trade-offs between these and other KPIs.
- Build community around making customers' lives better.
- Amplify existing actions into strong campaigns.

Trend 9 / Responsibility Takes
Centre Stage



People care about what the brands that they are buying stand for. They are now scrutinising how brands behave, and the bigger picture that is at play in the wider world. We encourage our clients, to - ensure that their brand purpose doesn't sit on the side lines, that they wear it every day as they build relationships with people. Actions in areas like cost of living, show their human side and build their Emotional Quotient – something our research shows builds a better world, but also makes good business sense.

Fiona Lloyd

Global Client and Brand President,
Carat



03 / COMMUNITY

Trend 10

Social algorithms give users what they don't know they want

Social media has changed. Platforms like Twitter and Instagram have traditionally focussed on who users followed, but now, as feeds try to compete with TikTok, it is more about seeing engaging, entertaining, noteworthy content, whoever shares it.



03 / COMMUNITY

Trend 10 / Social algorithms give users what they don't know they want

The TikTokisation of social algorithms

TikTok's most important innovation was the endless feed based on observed interests and popular content, rather than follows. Users' feeds are different, but this is largely driven by the algorithm, rather than who they have consciously decided to follow.

Services like Instagram also rely on algorithms, but until recently algorithms picked the content users would see from accounts they follow, rather than broadening the pool to include all content on the platform. This is how users could see important life events like births and weddings at the top of their feeds even if they had not opened the app for a few days. Twitter initially showed a chronological feed, taking all the content from every account followed, but switched to the algorithm model in 2016.⁶⁶

These days if you use these platforms it can seem like half the content is from accounts you do not actually follow, shown with explanations like "Based on your likes" or "Accounts you follow also follow."

In one recent example of how social media has changed, the account @BrunswickPkTRA (Brunswick Park Residents' Association - 3,400 followers) tweeted during the June 2022 UK heatwave a picture to show how the presence of trees could reduce the temperature of a street. The tweet went viral and has now had more than a million likes, but the account has not picked up many new followers.⁶⁷

Content now dictates fame, and not the other way around anymore

What this shows is that social media has now become much more about the content shared than the fame or the number of followers the user has. It is now much more possible for content from anywhere to go viral,

and for new users' content to be seen, if it is judged to be good by the algorithms, based on likes, shares, video views, and more.

Instagram is reportedly currently testing a feature to allow users to share other accounts' posts within their feed (as opposed to in their stories) - a sort of Retweet function for Instagram.⁶⁸ If introduced, this will increase the amount of content users see from accounts they do not follow, and give Instagram another data signal for their algorithm, on the basis that a share is an even stronger than a like as an indication that the content is good.

We are also hearing anecdotal reports that younger people are searching less on traditional platforms like Google.⁶⁹ Could it be that daily exposure to feeds on apps like TikTok and Instagram is organically bringing content to people so that they do not think of search in the same way as older generations? Or is it that they are searching on these apps instead? One writer spent a few days testing similar searches on TikTok and Google,⁷⁰ and claims that while Google is better for closed questions with a definitive answer (How many ounces in a cup?), TikTok returns surprisingly useful and entertaining answers for more open queries like (Restaurants in... and even What to watch?). If users have good experiences, they are likely to use search more, even if that is not in the original design of the service.

What Brands Can Do

- Test new creative-based strategies to capitalise on the changes in social media.
- Work with partners to ensure that content is engaging, relevant and timely, including testing memes.
- Develop short form video answers to popular search queries to capture searches on the newer platforms.

**Trend 9 / Social algorithms give users
what they don't know they want**



The TikTokisation of social algorithms has changed the way we use social media. TikTok's most important innovation was the endless feed based on observed interests and popular content, rather than follows. Social media now feels more natural, showing people their interests and creating a far better experience.

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