

GROWTH TRENDS 2023

**Culture, Media,
People and Tech**

Wavemaker

November 2022

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At Wavemaker, we know that change is the only constant.

We've built our business on the belief that the growth models of today will not serve the future. So, it's in our DNA to challenge what's gone before and imagine a better way to grow for our clients.

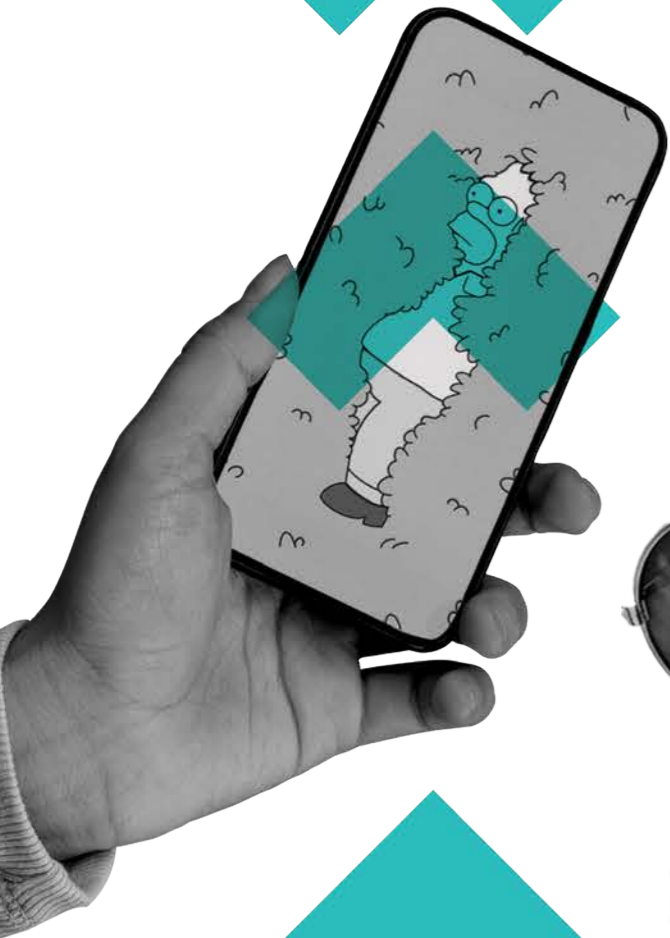
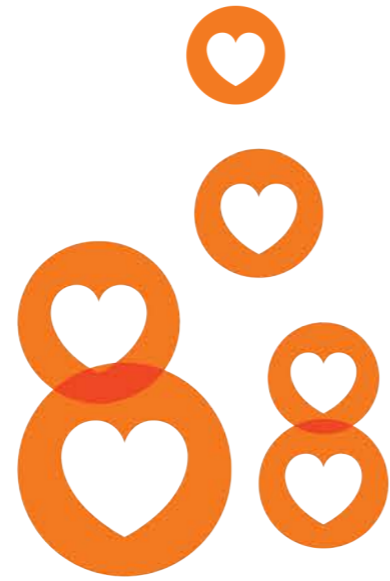
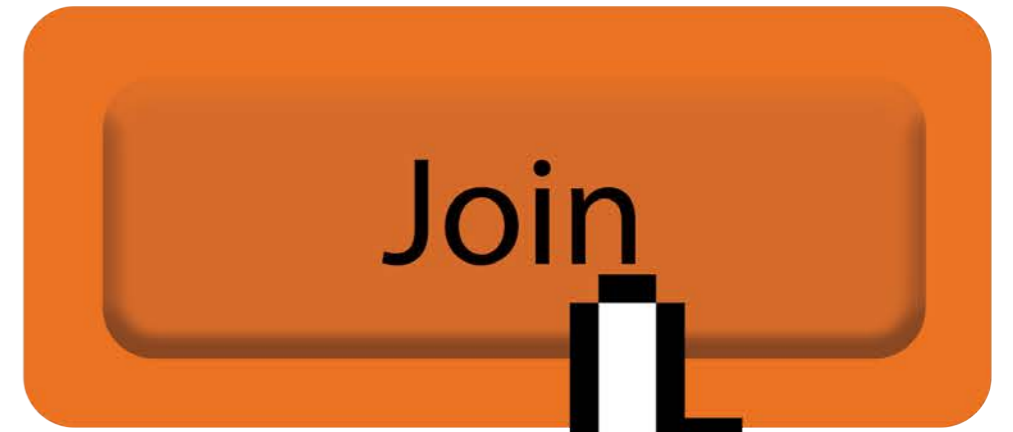
That's why each year, we make it our mission to identify the seismic societal shifts that are changing the way audiences behave, buy and consume media—and to decode and operationalise these changes for our clients. This year's Growth Trends report is no different. Across the upcoming pages, you'll find a plethora of growth opportunities across culture, people, technology and media that are waiting to be seized, along with key actions to help your brand take full advantage of them.

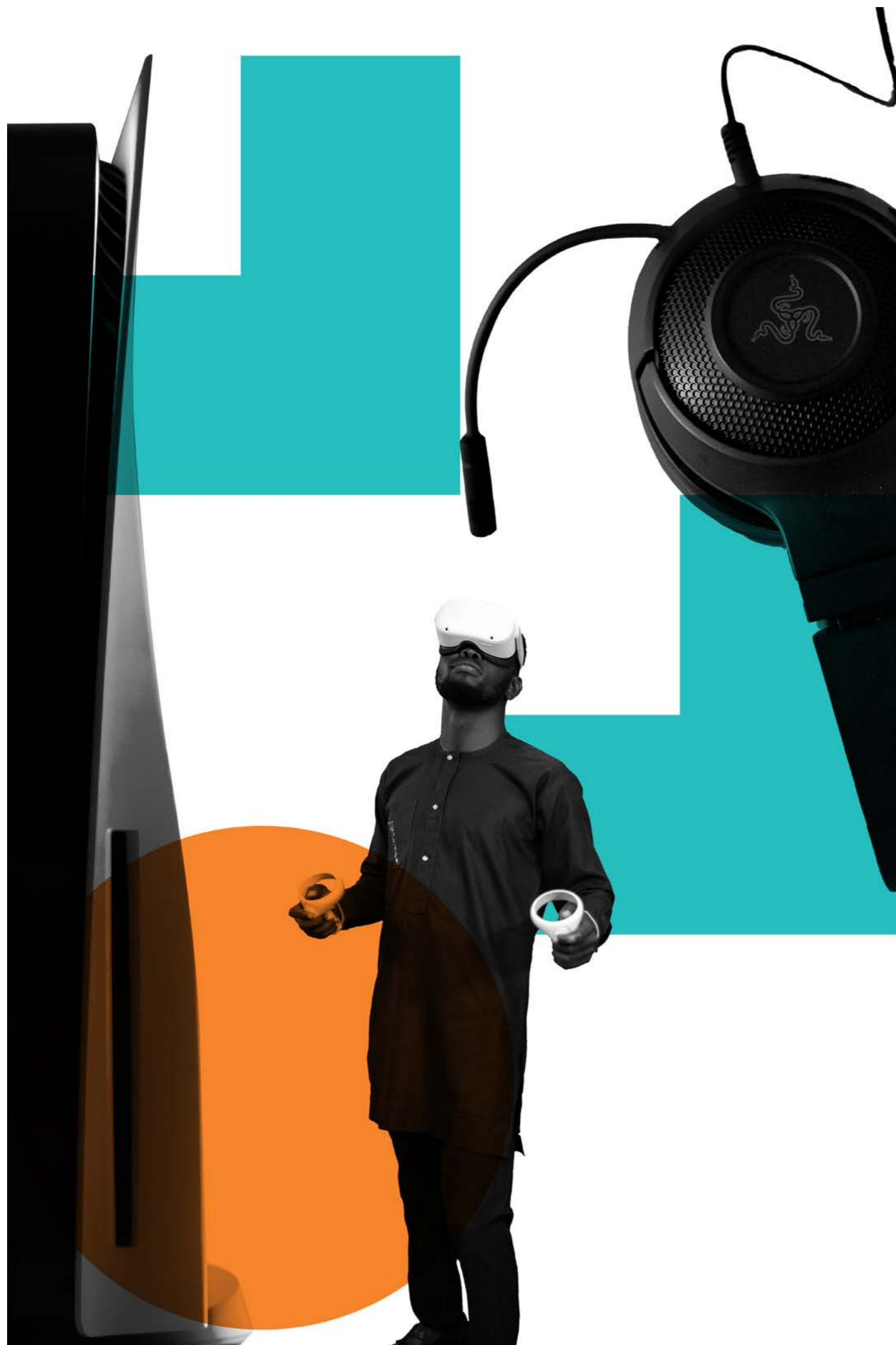
We hope you find it useful.



Verra Budimlija
Chief Strategy Officer
Wavemaker UK

Culture





The metaverse does not exist, but gaming is the real deal.



By Rory Davis
Managing Partner

The metaverse does not exist.

The term seems to be a near constant in the headlines of the trade press, but just because it's the current buzzword of choice and suits certain commercial narratives, it doesn't mean that it actually exists. A recent policy briefing on the metaverse from the University of Cambridge summarises this nicely by stating that Mark Zuckerberg's metaverse presentation, as part of Facebook's rebranding in 2021, changed the metaverse narrative, encouraging commentators to incorrectly describe existing platforms and applications as manifestations of the metaverse. They go on to clarify why this is not the metaverse, stating "such applications are neither persistent (because they reset when users quit them), nor interoperable (because they are siloed and it is not possible to move seamlessly between them.)"

So, despite all those headlines telling marketers that now is the time to plan for the metaverse, we're actually not quite there yet. And in most cases what we really mean when we use the term is gaming, which has been doing 'metaverse' things for years. Second Life, a game where you create an online avatar in a virtual world, spend real money on virtual goods and meet up with other users in cyberspace, came out in 2003, before the word metaverse even existed. Interestingly, Second Life still has a daily active user base 20,000 times bigger than Decentraland, one of the so-called metaverse platforms you'll read about in headlines (they have less than 1000 globally!)

The reality of the metaverse in its true meaning is some years away, but gaming, with its long history of creating immersive experiences for users, is carving out an ever-growing sphere of influence on the cultural zeitgeist.

01

Gigs in gaming are second nature

Travis Scott's mind-blowing concert in Fortnite was the most attended music gig in history, with 27.7m attendees. But what seemed like a crazy one off has now become commonplace, with hundreds of examples like Justin Bieber in Free Fire, Selena Gomez in Animal Crossing, Snoop Dogg in Sandbox and even Club Matryoshka in Minecraft - a virtual night club playing the latest dance music to thousands of people each week.

02

The fashion industry is gaming native

Burberry used gaming-streaming service Twitch to unveil their Spring/Summer catwalk, Balenciaga launched their Autumn/Winter collection in Afterworld: The Age of Tomorrow and Louis Vuitton created an exclusive range of character skins in League of Legends to promote their new line. Gucci, Moschino, Lacoste, Prada, Tommy Hilfiger and Ralph Lauren are all in on the action with their own collaborations—even last year's fashion awards were hosted in Roblox.

03

Gaming's influence is broader than you think

A recent Statista report shows that the UK now boasts 46.7 million gamers. While it showed a slight male skew, it also highlighted that gaming penetration among females has now reached 56% (vs 63% male.) They're a lot older than you think too—a recent Deloitte study revealed that in the UK, 95% of Millennials and Gen Z spend over 12 hours gaming per week, while 80% of Generation X spend over nine hours, and 46% of Boomers and Matures spend more than seven hours. It's continuing to shift in that direction too, with Ofcom reporting that there has been a 25% increase in UK gamers aged 55-64 in the last two years.

It's not just the brands that sit within those big cultural pillars like music or high-end fashion that are turning to gaming to engage audiences. A broad range of brands have started to notice that gaming provides the opportunity to connect, converse and even sample products with their consumers. Nike built its own world, Nikeland, in Roblox, which has been visited by over 21 million users. It offers a fully immersive interaction with the brand, with the opportunity to play games, engage with other visitors and explore and buy products from the digital showroom. Even brands like Hellmann's are in on the action, creating an island in Animal Crossing where users could donate their virtual food waste to provide a free real-world meal for those most in need. Partnering with charity FareShare, Hellmann's was able to supply 25,000 free meals.



Image source: Hypebeast

And while these bigger, more bespoke activations might not be right for every brand, the broader landscape of gaming advertising, down to the most basic in-game display and video formats, is something that every marketer should be considering.

Earlier this year, Huawei ran a mobile gaming test via Xaxis, replacing a portion of their display budget with virtual billboards and banners in popular mobile games, with a focus on brand awareness and recall. Through independent research company Lumen's eye tracking technology, they were able to see a 3.6x increase in average view time of ads versus other non-gaming display formats. Crucially, this was backed up by a 128% uplift in ad recall versus their standard display. Cases like these set a strong precedent for brands to integrate even basic gaming formats into their existing video and display plans.

A recent study by Tapjoy revealed that...

72%

of UK gamers willingly engage with rewarded in-game ads

The growth opportunity:

At a time where media consumption is fragmenting, gaming offers a touchpoint that reaches multiple audience segments at scale. Recent research by NordVPN suggested that Brits are gaming for an average of 4 hours 36 minutes a week, 68.9% longer than any other country. It's also a unique touchpoint in that audiences are truly receptive to advertising. A recent study by Tapjoy revealed that 72% of UK gamers willingly engage with rewarded in-game ads, whilst Anzu research shows that 66% of UK gamers say they would actually welcome more advertising in their games.

So ignore the headlines that tell you "Now is the time to plan for the Metaverse" because it doesn't exist yet. But what is here right now, is a rich gaming landscape that offers truly immersive experiences to a broad and ever-growing audience who love to engage with brands. And while the bigger activations might not be the right fit for every brand, marketers should be considering how they show up in the diverse gaming ecosystem that is becoming an ever-growing part of the media landscape and UK culture.



Image source: <https://about.fb.com/news/2022/10/meta-quest-pro-social-vr-connect-2022/>

3 things to do today...

01

Think audience first.

Who you're trying to reach will determine both how and where you show up across the gaming landscape. Ideally, you'll be creating something that will enhance their gaming experience in an authentic way. What are you asking of them and what are you giving in return?

02

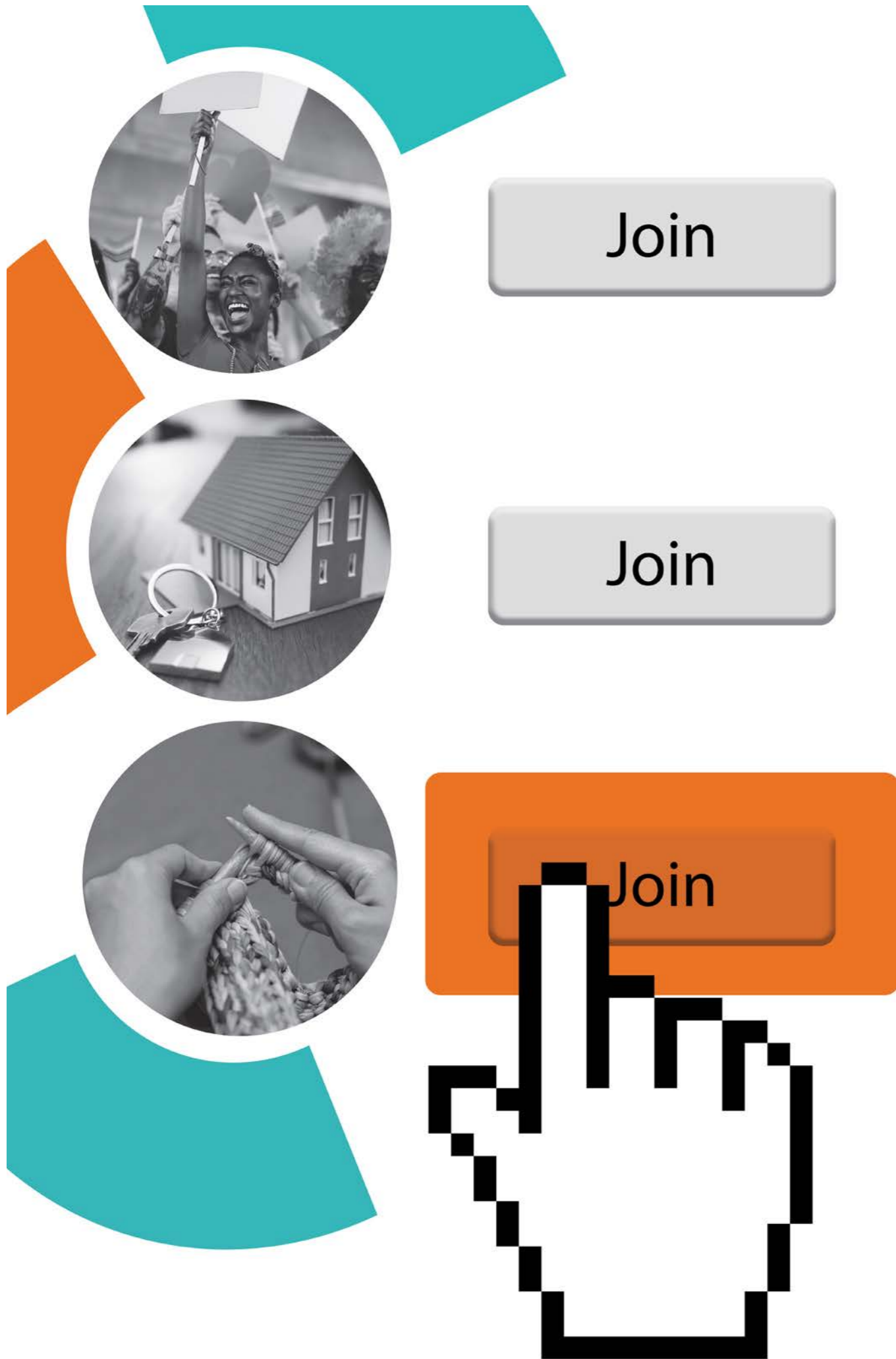
Start small.

If you're completely new to gaming, take your current basic display and online video plans and think about the opportunities to divert some of this budget as a small test for in-game adverts. With the right level of investment, most partners will offer brand studies to prove the positive impact this can have on your media.

03

Then go BIG.

For bolder brands, the possibilities are truly endless. Gaming partners are constantly looking for new and exciting ways to help brands come to life and there is always room to push the boundaries. What's the most interesting aspect of your brand or product? How could you bring that to life virtually in a way that would make users want to engage with it? The sky is the limit.



Finding credibility in online communities



By Callum O'Brien
Content Lead

Our online identity is becoming a key part of our personality, whether our presence is shrouded in anonymity or uses our full name.

These personas are shaped by our values and interests, but our behaviour and state of being can change depending on the spaces in which we operate.

Spurred by a sense of identity and belonging, online communities have never been stronger. We've seen major events such as amateur traders on Reddit affecting global markets and labour movement 'Enough is Enough' mobilising their online community with the ambition of making real societal change. Online community has never been stronger, but where do brands add value?

To answer this, we need to understand the communities themselves—what shapes them and whether your brand is the right fit. These communities can be broken out into three distinct groups:

Value based

Each individual has shaped their own value system based on their environment, family unit or media consumption. These values dictate their views on morality, religion and whereabouts on the political spectrum they sit when it comes to societal issues.

Experience based

This could be factors like gender, sexuality or ethnicity, where groups will form to help each other navigate the world around them. Alternatively, groups come together based on wider experiences such as buying a property, moving areas or even physiological shared experience with disease or pregnancy.

Interest based

Community groups based around our interests can be the most powerful as it's an area selected by the individual in which they are able to choose their own identity. Whether it's a favourite sports team, hobby or travel—these are selected building blocks of a life where people can find escapism, excitement, or conversation.

01

The isolating effect of the pandemic reminds us of the deep human need for connection, and millions used that time to turn to communities. According to global Facebook data from 2021, there are over 600 million people who are members of a Facebook group that they consider to be meaningful in their life. When the ability to be social in real life was lost, people started to reflect on what really mattered to them. These passions, hobbies and interests may have been born or improved with online communities, but they now form a significant part of their identity.

02

Reddit has built a business solely on bringing people together through these interests and identities, and it is experiencing huge growth. According to research by YPulse, in the UK alone, over 31 million users now visit the site to engage with their communities each month. 90% of Reddit users trust the platform to learn about new products and brands, which is even higher than the 89% of Google users who say they trust their own searches.

03

Research by Twitch found that 60% of Twitch viewers engage with the community through the chat function every day. Twitch users want to feel part of something larger and see streamers and their wider community as their friends. Brands that support and engage with their favourite streamer can see real dividends – according to a social media behaviour study by Twitch, 53% claim to have bought a product solely because they have seen it on Twitch.

When it comes to the forefront of science and technology, Formula 1 racing pushes the boundaries in a mainstream way. Toyota recognised this and targeted fans of the 'r/Formula1' subreddit with an action-packed story of two Toyota Supras racing. In doing this, they leveraged the clear interest in racing shown by the community rather than using generic creative.

But the fit doesn't always have to be so obvious. American online bank, Ally, wanted to reach a young tech-savvy audience, so promoted a tailored creative during PS5 launch week for 'r/Playstation' asking: "If you wouldn't settle for a 1-star rated controller, why would you settle for a 1-star rated bank?" While the community may not identify with a finance brand, they certainly understand the value of a highly rated gaming accessory.

While content is key, just showing support is important. Olio is an app that was created to tackle food wastage as a major contributor to climate change. The idea was simple – create a network among neighbours so they can share their surplus food with each other, saving money and the planet. Starting online and moving into real life, local communities were galvanised with over 6.1 million registering within the app to make a real difference. Brands noticed, and Iceland and Tesco are now major partners with the app. Together they have distributed meals that would have gone to waste to the app users, saving on food wastage and increasing positive perception within the community.



90%

of Reddit users trust the platform to learn about new products and brands.

The growth opportunity:

Corporate social responsibility initiatives and affinity groups within businesses are core building blocks for talking to value-based and experience-based groups respectively, whereas passion-based communities are open for brands to add value and connect with a self-selected hobby in a fitting style.

Taking mental real estate is important but improving the warmth that surrounds your brand can be what separates you from your competitors. In the age of data overload, we have no excuse to avoid personalising communications. The growth of online communities allows us to do just that.

In a world where values, passions and interests are more important than ever, these communities are growing. Subtly venturing into your consumers' favourite spaces is welcome, if you respect the community, add value and understand its boundaries. The potential for how you embed is scalable—from tweaking copy or creating bespoke content through to powering communities and pulling them into your own ecosystem. Your brand tone of voice could be consistent, or you could create a sub-brand that specifically focuses on that community's engagement. KFC Gaming now has over 260k followers on twitter, without a product—the community just enjoy what they bring to the party.

Supporting an online community doesn't always mean creating your own organic content. Brands can collaborate with specialist titles, where communities already exist, to create content. Interesting articles that wouldn't be produced without brand funding is a low-touch way to add value.

3 things to do today...

01

Relook at your audience through the lens of community.

How are they spending their time? You have the opportunity to leverage something incredibly special to your consumer—something that feels unique to them. Think about how your brand could exist in this space and what value you could add.

02

Think about what you are already doing.

There are many initiatives naturally happening internally or through CSR that add value to a community—the more people that know about these the better. People can relate to the support needed. Set this out as the first building block for a wider engagement strategy.

03

Test.

Start with small copy tweaks, amended creative and more focused targeting. Request insights and data from media partners. Find out what is on trend, what's interesting and what people are searching for. Then provide them with engaging content that they can relate to.

Looking back to move forward: how tapping into nostalgia can unlock growth



By Saj Nazir
Head of Content

Reasons to be cheerful as we enter 2023 are few and far between. The war in Ukraine continues, the global cost of living crisis worsens and the remnants of a pandemic that desperately clings on by its fingernails remains in our collective psyche.

The future is uncertain, so it comes as no surprise that audiences of all demographics are looking to nostalgia for relief and comfort. *Top Gun Maverick*, *Stranger Things* and a raft of new *Star Wars* content continue to resonate with audiences worldwide by filling a void and delivering a much-needed boost of reassurance and familiarity during dark times. Nostalgic content has successfully engaged audiences that were there the first time around, along with millions of newcomers, helping to prove that the past is a place brands can occupy to unlock growth.

While nostalgia offers ready-made audiences and communities for marketers, it's how advertisers connect with these potential consumers that matters. The most successful brands are producing content that finds a balance between the old and new by embracing modern technology. Innovation in media and content, including binaural sound the adoption of AR and VR, allows brands to exploit established IP and immerse audiences both old and new in innovative and exciting ways.

01

A study by the Journal of Consumer Research looked at why nostalgia is a trigger for consumers and found that nostalgia has a strong presence in the marketing of goods and services. Consumers who were asked to think about their past were open to spending more on goods and services than those who reflected on current or future memories.

02

Recent research by Nielsen found that more than half of consumers were finding comfort in old TV shows, films, and songs from their youth. Pokémon cards are skyrocketing in value and stars of 2000s films like *High School Musical* have been a huge hit on TikTok.

03

The Mintel Trend, *Never Say Die*, explored consumers' receptivity to advertising and marketing with a nostalgic skew. Present-day Millennials, who were children in the '90s and grew up during a time that saw financial and emotional uncertainty, including two recessions, 9/11 and more recently COVID-19, were more likely to be receptive to nostalgic marketing. Findings showed that consumers aged 25-44 were most likely to agree that they enjoy things that remind them of their past, such as their childhood.



Nostalgia offers brands the opportunity to capitalise on consumer interest in the past by delivering campaigns that relaunch, revive and reimagine old products, pitching them to consumers both old and new. During the pandemic, brands were reminded that nostalgia could have a powerful emotional hold on audiences, with customers more likely to respond favourably if a campaign triggered an emotional response or a happy memory of days gone by. A global audience have embraced the nostalgia-fest that is Stranger Things—a show set just before the internet invaded every aspect of life as we know it, the last moments before we all began living always on and always available lives.

Set during a simpler time, the series appealed to Gen X, Millennials and Gen Z. Brands saw the opportunity and took full advantage to engage this broad audience base. The series continues to deliver a huge global audience and the fourth series of Stranger Things delivered exceptional results for a host of brands. Data from YouGov Stream in the UK and US reveals that Coca-Cola received placements of £2.8 million. Other brands benefitted too; Reebok with £2 million and Lacoste with £1.9 million of on-screen placement. The series finale alone delivered £6.1 million of value and featured 35 brands.



Image source: <https://www.coca-cola.co.uk/marketing/campaigns/latest/coca-cola-x-stranger-things>

Embracing modern technology to offer something familiar yet new and relevant for today is key to driving brand growth

While Stranger Things has proven to be a brilliantly effective platform for brands, not every brand should rush to jump on a retro trend. Being contextually relevant and having a reason to be there is crucial if you want enthusiastic and knowledgeable fans to follow your brand.



Image source: <https://sneakernews.com/2017/10/31/stranger-things-bait-reebok-vintage-shoe-release-date/>

The growth opportunity:

Consumers may lean into nostalgia, but they also expect fun and spontaneity—Mintel research in 2022 found that “consumers globally are seeking exciting and enjoyable new experiences in their purchasing behaviours, alongside an appreciation for things that remind them of their past.”

‘Newstalgia’ or the new nostalgia is the desire to experience something familiar, but also something fresh. This is the sweet spot for brands. Simply harking back to the “good old days” is not enough. Embracing modern technology to offer something familiar yet new and relevant for today is key to driving brand growth. Companies and marketers can respond by merging inspiration, innovation, and authenticity to offer their customers the things they know, love and will appreciate.

Lego, a brand founded in 1932, has successfully evolved to ensure it remains relevant in the present day. From basic Lego sets, to seeing some of our favourite on-screen characters and backdrops made available, to the launch of the Lego movies that saw Lego become its very own global entertainment franchise. The Lego brand continues to reinvent itself to drive growth.

Meanwhile, in the automotive sector, Volkswagen has reintroduced its iconic campervan as an EV. The new ID Buzz shares many of its design features with the much-loved classic VW Campervan, from its external shape to its internal features. But this is an EV packed full of the latest technology and the option of recycled interior fabrics. A great example of upgrading an iconic vehicle while using technology and sustainability as key drivers for growth.

It is important for nostalgia-focused marketing campaigns to adopt a forward-thinking approach; to offer something fresh and interesting to consumers. So, identify what makes you and your audience unique, be respectfully disruptive and embrace ‘newstalgia’.

3 things to do today...

01 Create meaningful consumer connections based on the past.

This can be done through the delivery of dynamic brand experiences that excite and engage pre-existing audiences and fandom communities.

02 Add value and enhance consumer experience.

Do this through the integration of modern technology for consumers to enjoy, but remember to remain authentic to your subject matter.

03 Don't focus solely on one generation.

Nostalgia is not the same for all consumers and there is greater potential in considering all age brackets.

To meme or **not** to meme?



By Ben Levy
Strategy Partner

Open your favourite social media app right now. If your feed is anything like mine, you will be inundated with memes—short videos or images that spread around the internet sometimes with small edits and often in a humorous way. The key to a successful meme is brevity. The less “weight” a piece of information carries, the easier it is to spread.

As media consumption habits continue to shift online, especially towards social media platforms, brands are having to think differently about how they deliver communications. Many have had success in using the platforms to drive action, response and sales, but often struggle to create brand-building effects. Video ads get scrolled past, engagement campaigns deliver inconsequential results (unless you offer free stuff) and static image ads feel underwhelming at best, ignored at worst.

Attention is hard to command in social media, and simply showing up how you do in other channels isn't effective. However, by tapping into consumers' existing culture and behaviour in these platforms, brands can make social media work. Now is the time for brands to embrace the power of meme marketing.

01

Social usage surges. In a post-lockdown world, according to research by Ofcom, 16-34 adults are spending over 33% of their curated commercial media day (time spent with media excluding OOH) on social media, compared to just 12% spent with live or recorded TV.

02

Memes go mainstream. Research conducted by YPulse found that 55% of 13-35-year-olds send memes every week—and 30% send them every day. There are a million memes shared a day on Instagram, double the amount that were shared in 2018. Memes no longer sit on the fringes of internet subculture—they provide a legitimate mainstream marketing opportunity.

03

The new home of memes keeps growing. TikTok's unique content discovery algorithm is a perfect breeding ground for mass-market meme marketing. With a forecasted reach of 14.8m users, and UK teens spending over 100 minutes per day on the platform (Qustodio, 2021,) the growth of TikTok is providing a step change in the speed and scale at which marketing memes can spread.



Ten years ago, enabled by the rapid growth of YouTube, the holy grail in marketing was to create a viral video—a single piece of content, made by the brand, that travelled far and wide across the web and was shared between friends and families. Today the words “we want this to go viral” should send a shiver down the spines of media and advertising professionals. YouTube is now a graveyard of failed viral videos that achieved a million views through paid media to hit a vanity metric, but never got shared. The difference between viral marketing and meme marketing is subtle but distinct.

The trick is to not tell people *what* to share, but create the cultural capital so that people *want* to share.

Meme content is perfect for modern social media platforms. Memes are unfiltered, authentic and original and tend to be short, sharp, witty or topical. They provide attention for the brand through the lens of their online community.

A perfect example of brands embracing meme marketing was the recent TikTok campaign Tesco ran where they were looking to recruit the new voice of their checkout tills. Users were encouraged to reply and respond to the Tesco video with their own take on the self-checkout script. At the time of writing, the meme videos created by the TikTok community have over 45m video views, generating around £1m of media value, as well as PR pick up in all the major national titles.



Image source: Tesco TikTok

The growth opportunity:

Fame. Buzz. Attention. Salience. Whatever you call it, brands are all after the same thing. It's the jet fuel for brand growth. Throughout the history of marketing, this has always been the case. But generating that effect has always been difficult. Delivering reach in media is necessary, but alone, it is not a guarantee of success. Brands need to be seen and noticed, yes. But crucially, they need to be remembered.

Meme marketing is a brilliant opportunity to drive a spike in fame, attention and buzz for your brand. It can create salience and top-of-mind awareness through a mix of PR, earned media, conversation, and most importantly sharing. And it's this sharing that makes memes such an effective marketing tool. Sharing not only increases the number of people seeing your message, due to the participation and involvement, it also massively increases the likelihood of creating strong memory structures for your brand.

While meme marketing should not replace long-term brand-building tactics, creating meme-worthy brand moments will create spikes of fame, buzz and attention that drive growth for your business. These can be particularly powerful when anchored to an audience segment, cultural moment or context that is important for your brand.

3 things to do today...

01 Create shareable culture through content and characters.

TV shows are now writing in meme-able scenes with gifs in mind for viewers to share online, increasing attention for their show, making it more salient. The same can be done by brands in other categories using brand characters and ambassadors.

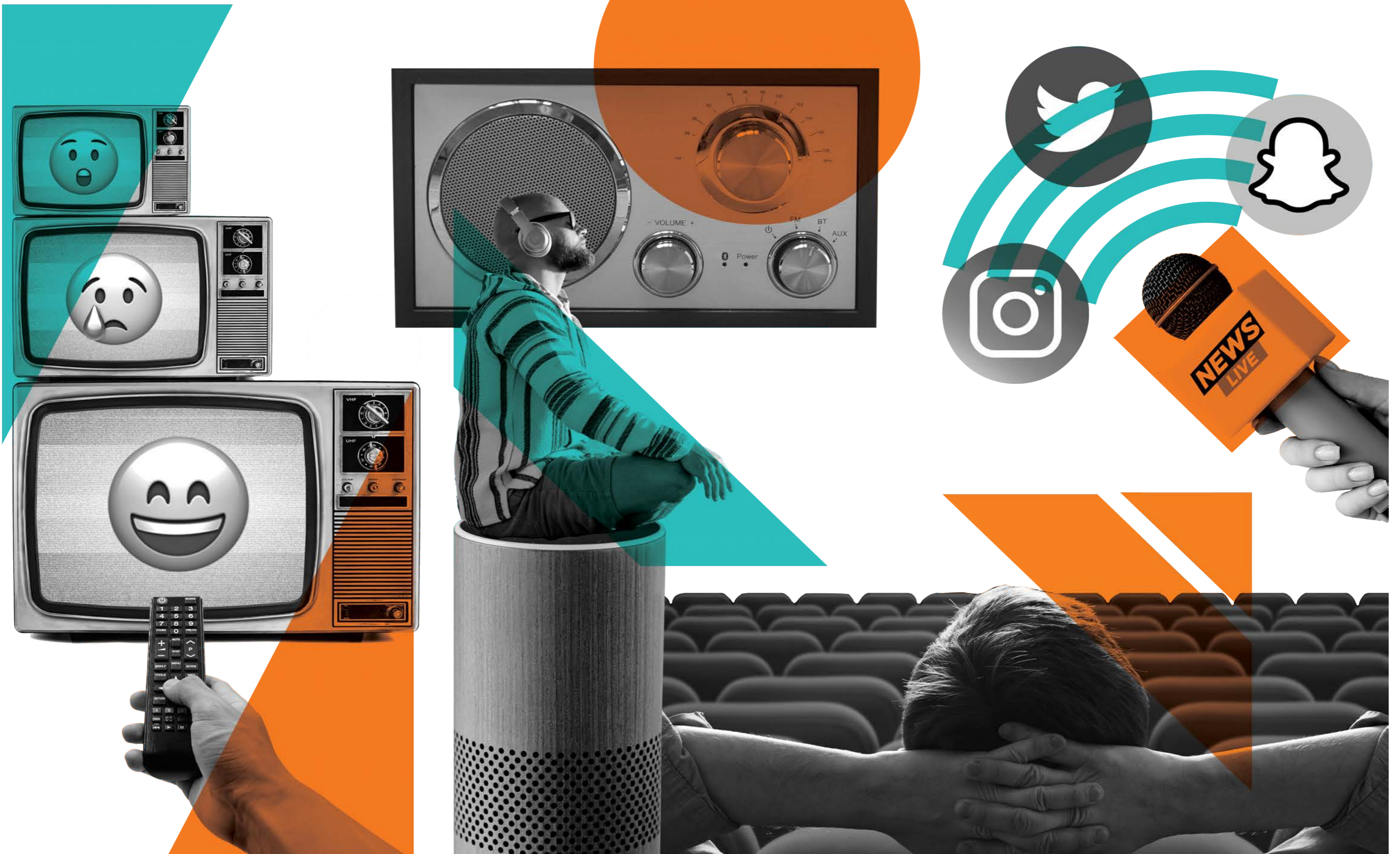
02 Create cultural capital through radical and surprising collaborations.

Find a partner and create disruption together. Make something together that people will want to talk about and share.

03 Empower communities to shape the conversation in their own way.

This may be uncomfortable for brand managers who must live by set brand guidelines, but when it takes off, it's better to embrace it, encourage it and let the meme travel far and wide.

Media



Harnessing the power of TV moments



By Eve Thompson
Media Partner

Is there simply too much TV? In a fragmented world, which pits traditional broadcasters against the new-kid streamers on the block, how are viewers and advertisers going to keep up with content?

To successfully cut through an ocean of programming, brands must navigate the islands of essential viewing: the TV moments. TV's superpower is creating stories that connect people and provoke emotions. These essential viewing moments are the shared cultural experiences that unite different viewers across the nation.

Brands that successfully harness viewing moments become part of the conversation, which is vital in staying relevant. Ignore storytelling, branding and conversation at your peril, because awareness will suffer.

01

According to BARB, “one of the reasons we are so interested in television viewing is that it reflects what we are interested in as a nation”. A TV moment is defined by the interest it achieves, and in a pre-pandemic world, this was ‘water-cooler’ TV. Netflix knows this. Their new Basic with Ads package’s greatest hook is enabling brands to be part of its powerful but previously walled “zeitgeist moments.”

02

Often these unmissable moments are happening live. A combination of an event that’s fuelled by viewers watching but is created by broadcasters. Whether it be news, sport or reality-entertainment. They most often attract big viewing figures—the Queen’s funeral achieved a peak audience of 37.5 million viewers across 52 channels, and the Men’s Euro Final in 2021 achieved a combined audience of 31 million, for example.

03

But moments aren’t always defined by the size of the viewing audience. Some appear with serendipity and require a perfect storm of shared experience. During 2021’s storm Eunice, Youtube’s Big Jet TV Channel live-streamed planes heroically trying to land, attracting up to 200,000 live viewers and multiple mentions on news and social channels. It was talked-about TV because everyone across the UK was being battered by the storm.



TV moments generated by the news have recently driven huge viewing figures, but they can be unpredictable and dangerous ground for brands. Typically, brands can react on social channels but there's a risk; reactive tweets can be social media Marmite.

In the ever-fragmenting TV world, harnessing predictable cultural moments enables more time to think about audience behaviour and creative execution—a safer bet for brands.

Sport, reality entertainment and dramas are sure-bet genres to spike viewer interest. These are the appointment to view programmes—the great stories generating feelings of emotion and enabling viewers to feel part of something. They also generate chatter and become social currency.

The 2022 World Cup will be a special cultural moment with 99% of games being viewed live. Sky's 2022 Autumn sport marketing campaign highlights the live factor with the strapline, "It's only live once". If you miss it live, you'll miss out. No one wants sport FOMO, which makes it a key genre for advertisers to feel current and align with national buzz.



Image source: Netflix, football.london

The biggest rating entertainment programmes follow a tried and tested format. They are typically reality-based competitions with engineered entertainment. Bake Off and Love Island are shows that are watched together and even have their own spin-off shows and podcasts to accommodate the conversations they generate. They have a shelf life because contestants are routinely evicted per episode or week and are typically not binge-watched.

Drama is the realm of the binger. For streamers, the impact is on artificially creating or capitalising on a moment with hyped PR, the curatorial ability to drive consumers toward suggested content, and windowing strategies that prolong interest. Was Squid Game a word-of-mouth success or did the Netflix algorithms push it to trend? ITVX's launch will experiment with windowing strategies to pique viewer and advertiser interest.

The brands that harness viewing moments become part of the conversation,

which is vital in staying relevant.

The growth opportunity:

Brands that target TV moments put themselves at the heart of the public's interest and at the epicentre of conversation. Put simply, plan for the biggest moments to achieve scale and those smaller moments that resonate with your target audience to drive authenticity and relevance. There's something to suit every budget.

The closest way to dominate the moment is to directly link up with the show. These days, programmes have morphed into brands. "Babe, you ok? You've barely touched your House of the Dragon wine?" Yes, you can watch and now drink Game of Thrones.

There have been over 100 Stranger Things product tie-ups. Product tie-ins and on-pack promotions push brand associations into the hands and minds of the consumer. It's a clear way to dominate and own a moment. But, as with programme sponsorship, it's limited to one show.

That's the beauty of TV, there isn't one moment, there are multitudes and different meaningful moments to different audiences. Understanding what's meaningful to your audience is imperative.

Media owners will create new ways for brands to target moments. Netflix's Basic with Ads subscription enables advertisers to target by country, genre or top 10 trending albeit at a high CPM. We will also likely see more 'event' led advertising solutions across VOD, enabling advertisers to own specific days and moments such as Black Friday, Valentine's Day or Saturday nights across a platform, as well as more in-programme shoppable formats.



Image source: <https://www.houseofthedragonwines.com>

3 things to do today...

01 Create 'Brandgeist' by aligning with the zeitgeist.

Plan for events across all aspects of the TV landscape by knowing your audience's passions and interests. Aim for the firework moments on TV and niche, cult viewing on CTV and VOD.

02 Seek innovation and opportunity in all aspects.

Outsmart inflation by targeting moments in VOD or specific regional buys. Experiment with new shows that launch on VOD to get to the newest moments first.

03 Ensure creative is authentic: matching the mood and the moment.

The better the cultural 'fit' the more meaningful and effective the advertising. Think the Superbowl in the USA or Christmas advertising in the UK.

Newsflash: news consumption is changing and so should you



By Emma Dibben
Head of Print and Media
Partner Engagement

It is not new news that news consumption is shifting, or that social media and aggregators such as Apple News are important access points for consumers. What is new is that in markets including the UK, the 18-24 age group are now more likely to use social media as their main source of news (39%) versus established news sites or apps (34%).¹

This represents a key shift in behaviour, which can be attributed to the emergence of platforms such as Instagram and TikTok. It means that the way in which news is consumed is different for social natives (18-24s) and this difference is exaggerated further for the under-18 age group.

News consumption is becoming, and will continue to be, more of a serendipitous discovery based on personal interests rather than the more traditional presentation of the news agenda. The audience's expectation is that content will be snackable. Consumers are curators now and so they have higher expectations that news will be 'for me.'

If social media is the gateway, providers such as The Sun, Channel 4, BBC News, Guardian, MailOnline and LBC are the destination for the facts and the full story. Piggybacking the social journey with publishers, and being present at the destination, will unlock optimum growth for brands across multiple platforms and will support verified sources of journalism.

01

In 2018, 52% of 18-24s started their journey with news websites or apps; in 2022 this figure is just 28%. The 35+ group accessing news directly in 2022 is at 49%. From this, we know that the disparity in news consumption for older and younger groups is becoming greater.²

02

When it comes to Gen Z's engagement with news, Twitter has the highest proportion of UK 18-24s accessing weekly news at 21%, followed by Instagram at 17%. Not surprisingly, the fastest-growing news platform is TikTok. Engagement in news via TikTok in the UK has increased from 1% in 2020 to 8% in 2022, and 16-24s make up half of these users.³

03

While there is an educational role in news consumption for younger audiences around hard news, we know that under-35s are more likely to engage with soft news topics. Key themes include science and technology (40% interested) entertainment and celebrity news (33% interested) culture (music, books, film and arts, 37%) and lifestyle news (36%) which is perfect territory for brands to play in.⁴

^{1,2,3,4} Reuters Institute, 2022 Digital News Report

UK news brand platforms reach 80% of 18-24s monthly⁵ and 36% of young adults aged 16-24 access news via BBC One, with 29% using a BBC website or app.⁶ While we know that the journey starts in social, established news providers are a key destination when it comes to news content. These news outlets have recognised the importance of emerging platforms and are creating original content specifically tailored by platform. In many cases, the presence of these brands is nascent. The highest-ranking UK news providers brands on TikTok for news include the BBC, Sky, ITV, Daily Mail, The Sun, Guardian, Daily Star and Channel 4, but the footprint is currently relatively small with 24% of news on TikTok coming from news organisations. The remaining 76% is a raft of user-generated content from 'other people' or 'friends and family'.⁷

We can expect news media outlets to create much more editorial and co-branded content, which is more specifically tailored for social platforms to reach Gen Z. For brands, this presents a key opportunity to co-create content which is specific to social platforms via trusted news providers.

When it comes to targeting 18-24s, the audience is hard to reach. Standout on social media is difficult and news providers are not an automatic consideration to cut through to young audiences. But brands can harness softer content strands such as lifestyle, entertainment and sport. Consumers who are in discovery or learning mode bring an opportunity for brand discovery and consideration, and news providers can fulfil this need.

18-24s are now more likely to use social media as their main source of news

39%

VS

established news sites or apps

34%

The growth opportunity:

Brands can 'piggyback' on publisher social content by activating video and display ads against publisher content on the likes of Twitter, Meta platforms and YouTube. Content can be co-created specifically for social with media partners around particular moments, such as the FIFA Women's World Cup 2023, which will reach consumers in the moment. There is a huge growth play in ecommerce on these platforms too. For example, live events can drive growth for brands. 'TikTok made me buy it', curated by publishers, has powerful potential and is coming soon.



Image source: Unsplash.com, Marten Bjork

3 things to do today...

01 Remember that social media platforms are search engines.

Capitalise on the fact that young audiences are in discovery mode and consider how piggybacking social media news content can help new audiences find your message and potentially drive e-commerce.

02 For co-branded content, give the audience creators that they respect.

Make it interactive and focus on interest areas that resonate.

03 Think about the role that different types of news can play for your brand.

Consumers are 'finding' many different types of news across a variety of media brands. Should a brand venture further into content creation beyond social media with an established news platform, consider the role for different formats such as video, audio and text, in both long and short forms.

⁵ PAMCo 3 2022

^{6,7} Ofcom, News Consumption in the UK 2022

Audio is now omnipresent, but is your approach omnichannel?



By Scott Braniff
Head of Investment, Digital and Print

In a world where artificial connection via technology has become a key component of life, consumers are increasingly seeking a sense of real connection and belonging. The rise of home working and solo living has enforced this need for companionship and has coincided with consumers turning to audio as a companion medium. The way in which listeners are tuning in and engaging with audio content as a broadcast and a precision medium is becoming more nuanced and complex.

As result, there is a growth opportunity for brands that are able to implement seamless and smart audio experiences across both linear and digital channels.

01

The 2022 Radiocentre *Generation Audio* study confirms that audio has become an important antidote and companion in a challenging world where half of working adults work from home, often alone, at least one day a week. The study confirms that 26% of adults listen to keep themselves company, which is a new need state identified for the medium, and 35% do so to lift their mood. This need state is important because it means that there is an opportunity for much deeper engagement for brands.

02

88% of the population tune into radio every week, with live radio making up 71% share of adult listening. Linear radio provides an experience that on-demand cannot. Listeners have brand affinity with stations and genres via live and shared experiences. There is a relationship with presenters in real time that brands can continue to harness, with the realisation that these connections are more important to people of all ages than ever before.

03

38.9 million adults in the UK listen to digital audio, and time spent with this channel stands at 1 hour 22 minutes each day. There are now 17.2 million podcast users that contribute to this listening, making up 44% of all digital audio users. 74% of podcast listeners say podcasts provide them with content they want to dedicate their attention to, and they use headphones 90% of the time. This is a leaned-in, one-to-one experience where the listener has self-selected what they want to listen to and has switched off distractions to do so. It is focused listening where people can engage with their passion points in a comforting and relaxed way.



Audio can work for listeners in diverse ways across different platforms. Despite the audio landscape being complex, listeners are embracing it and are using a range of connected audio devices to consume it.

The growth in audio touchpoints available enables brands to reach audiences in a range of contexts and environments at scale. Importantly for brands, these audiences are highly engaged, and the audio experience consistently triggers a positive emotional response. Relaxation and “keeping me company” are the top two reasons listeners consume digital audio.

However, streaming services, podcasts, and digital audio, while mainstream for our listener, remain fragmented from a planning and buying perspective, creating siloes that are inefficient for media planning.

As a developing space, digital audio is experiencing various speeds of development across the market, meaning consistent targeting approaches and access to listener data are uneven in their availability and application. As users have moved from listening via web players, where cookies could be deployed, to app-based players and smart speakers, addressability has also dropped.

To counter this fragmentation and complexity, brands need to try and boost addressability. This could be through the creation of additional contextual audiences across supply partners, testing of delivery across supply where non-cookie-based targeting will scale—YouTube and Amazon—or testing of new tech for keyword targeting across podcasting and AI-read articles.

The pace of change in digital audio is exciting for everyone, and it has stepped up in terms of measurement and effectiveness. Currently, measurement exists in the siloes of the major players, with little 3rd party verification, so there is an opportunity for brands to evolve how they measure the impact of digital audio more broadly.

**Audio has
become an**

**important antidote
and companion**

in a challenging world

The growth opportunity:

Audio is everywhere. YouTube, Amazon, premium publisher podcasts and diverse audio content are areas of new supply. More quality and diversified supply means more ways for brands to have a meaningful impact in audio. Cancer Research and Tesco are examples of brands that leverage data across this supply and make addressable creative an essential part of their digital audio activity.

Addressability in siloes is not addressability, and it risks an inconsistent brand experience. Navigating this complexity and having a single view of the market means brands can achieve more with their budgets. A holistic view of inventory, audience, context and a single creative delivery mechanism means brands can design once and distribute at scale.

The voice engagement capabilities of smart speakers—which are now in 52% of homes—also have a key part to play in helping brands identify and measure growth. Interactive audio ads, where a listener is prompted to engage with their smart speaker, now give brands a measurable outcome for campaigns.



Image source: [Unsplash.com](#), Sebastian Pandelache

3 things to do today...

01 Harness the nuanced need states of consumers across linear and digital audio planning.

This can be done by ensuring that message and tone is specific to each environment.

02 Use the power of live broadcast radio in combination with smart digital targeting.

Then you can create campaigns that people can experience with other listeners, but also at a one-to-one level.

03 Consider how addressable messaging can deliver growth through personalisation at scale.

Map out the data signals to inform how, when and what type of message you deliver to your audience.

Stop thinking channel and start thinking encounter



By Elliott Millard
Head of Planning



Monica Majumdar
Head of Strategy

Brands need to stop thinking by channel and medium, and start thinking about how people experience advertising. Why? Because the historical silos of old media are non-existent. From outdoor suppliers, you can buy static 6-sheets (which are like press 10x7s), moving DOOH 6-sheets (akin to social posts) as well as DeepScreen takeovers (akin to a cinema gold spot). Partners such as Global sell audio as well as OOH, while you can buy video as well as press insertions from the Guardian.

Thinking in traditional channel silos—who you buy from—doesn't help brands create truly 360 media campaigns, where messages and objectives are aligned by format experience. So, what if we reframed that thinking —instead of OOH, digital, press and AV, we thought of static (press insertions, static OOH, display banners), video (DeepScreen, social, VOD, TV), audio (digital radio, streaming audio, podcasts) and so on and so forth?

01

As an industry, we recognise the blurring of lines between channels and the fact that consumers (the mythical 'real people, in the real world' that we build campaigns for) don't distinguish between touchpoints in the way that we do, but we have been hamstrung by our own language and structures for too long.

02

We need to find a way to adapt our language for a world where the distinctions of 'channel' are ever more irrelevant, as media becomes even more fragmented.

03

The consumer experience of media is not aligned by the salehouses and channels by which we purchase it. They don't think 'traditional and digital' for instance – just that they saw an advert on their mobile and on TV when they were catching up on their favourite series. Said digital video will feel more like a TV advert to the consumer, though on a traditional media plan, it would be assigned as mobile, programmatic, social or video.



To continue to deliver the right messages, to the right person, at the right time, we need to rethink our approach.

What if instead of medium, channel, or touchpoint, we thought of the encounter—how we want the consumer to feel at various points across the media ecosystem? Launching a new brand platform requires high dwell times and an emotional response. Meanwhile, a reminder of a sales promotion requires low dwell time and high frequency. So you could use a combination of TV 60”, cinema, in-article video, Piccadilly Circus DeepScreen, and long-form social for the former, with 6-sheet posters, VoD pause screen, and digital banners for the latter.

Brands are starting to shift to think about the encounter they want audiences to have with their marketing. Take the launch of Paramount+ for example—with the iconic Paramount Mountain encircled in stars at the epicenter of the launch phase. At launch, the encounter they wanted to make was unmissable static media dominations. Entertainment category norms would have necessitated newspaper cover wraps, but in media, we could deliver this encounter with not just print coverwraps, but also a full takeover of the London Eye.

In the second phase, Paramount+ needed to hero the trailers of key content offerings, like Halo, with full motion, broadcast video. TV would have been the go-to channel choice historically, but with summer programming offering limited appropriate environments, the encounter could be delivered through the cinema Gold Spot and Piccadilly Circus DeepScreen. In the third phase of the launch, Paramount+ had to fully unpack the library of content that it had in an engaging way. The encounter needed here was an interactive menu, and whilst Instagram and Facebook formats would deliver this encounter, so did a digital homepage takeover driven by emojis (the first emoji skin takeover created by Mail Metro Media). Selecting the alien emoji 🛸 brought up Chiwetel Ejiofor in Paramount+’s new and exclusive sci-fi drama, The Man Who Fell to Earth, in both the Mail Online homepage takeover and the Instagram story, whilst selecting the palm tree 🌴 would switch up the display to the much-loved reality show, All Star Shore, featuring Joey Essex.

	OOH	Print	Display	Social	Cinema	TV/VOD
Static	6-sheet poster	25x4 10x7	Banner	Static Facebook post		VOD pause screen
Immersive video	Deep screen			TikTok top view	Gold spot	
Product placements				TikTok creators		Sponsorship
Bumpers	Digital 6-screen	Rich media	Rich media	Gif/social video		
Short videos		In-article video	Native video	Instagram story		10” TVC

The growth opportunity:

Thinking by media encounter helps to provide a truly holistic media experience for the customer which is focused on receptivity. A media experience that is as seamless as the messages and interactions with the brand is more unified by the encounter. So, all video encounters will feel as one, as would all static encounters, whether print, mobile, or point of sale 6-sheet. This helps to build effective frequency (all video, or all static, whatever the channel), as well as more potent saliency, as the brand interactions would not be as disjointed for the audience just because they happened to be catching up on a football game on their mobile.

Thinking by media encounter, rather than channel, also enables more efficient media plans. For example, an aggregated ‘video’ buy across social, VOD and TV means minimising frequency and increasing reach for a similar budget. This enables brands to think cross-channel, and to manage frequency and reach. You can reduce excess frequency, and never fall below threshold communication weights.¹

There are infinite choices for consumers and advertisers. However, by thinking in channels, brands default to thinking in traditional ways and using conventional popular formats for the category and platform. Thinking encounter opens your pool of media options to deliver a more salient brand experience. This allows brands to use channels and formats that their competitors aren’t using, because they’ve spotted the opportunities in the way consumers consume media that competitors haven’t. For instance, Google research shows that 50% of shoppers use online video while in store as they browse products, meaning that encounter of point-of-sale reminders could be delivered with online mobile video as much as 6-sheets outside store.

¹ Wavemaker Open Video 3.0

3 things to do today...

01 Be open to using channels in unconventional ways.

Don’t be afraid of using channels at unexplored points in the consumer journey either.

02 Build creative assets by media encounter, rather than by channel.

This will deliver greater media and messaging consistency for the consumer.

03 Start asking for media plans by encounter, rather than by channel.

Reach and frequency can be reported across encounter (easily done through a few adjustments in Wavemaker’s proprietary Maximise tool), and pivot measurement metrics (i.e. one video metric for all relevant media formats) to enable greater buying efficiencies and to deliver more effective plans.

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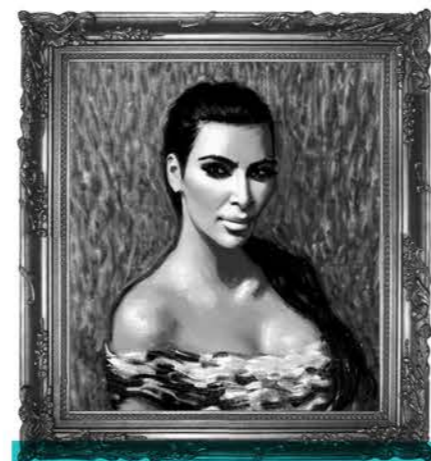
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Everyone's an artist with Generative AI



By Rozzi Merrington
Head of Innovation

Although the term 'generative artificial intelligence' (AI) is relatively new, most of us will have come across one of its applications in 2017 when 'deep fakes' started spreading across the internet. Generative AI uses AI and machine learning to create new digital content (such as text, video, audio and imagery) with little need for human intervention; beyond a starting input such as a key word or instruction.

Game-changing new generative AI tools like Dalle-2, Midjourney and Stable Diffusion all launched last year, offering easily available low-cost ways to generate believably real or consciously stylised content in seconds. Meanwhile, start-ups in this space have been closing successful funding rounds as Silicon Valley starts to take notice of the disruptive potential of this technology.

Hyper-realistic digital avatars from companies such as Soul Machines and Synthesia are becoming more common, while the fight to dominate the AI voice market is being hard-fought by start-ups and big players like Baidu, Microsoft and Amazon alike. In the second half of 2022, we saw tech giants getting even more involved. In September, Meta announced its "Make-a-Video" programme, which can generate videos using AI, and Google matched them recently by announcing Phenaki; a programme that supports text-to-video generation.

Now, we're starting to see that Generative AI is entering mainstream business operations, offering innovative new ways for brands to deploy high-quality, cost-effective, optimised and personalised content at scale.

01

By 2025 it is estimated that 10% of all data produced, and 30% of all outbound marketing messages from large brands, will be from Generative AI (Gartner 2022.) AI image generator Craiyon, for example, launched in July 2021 and is now generating 10 million images a day.

02

Up to half of marketers are using AI in some way already (Gartner, 2022.) AI is making such a huge impact that global spending on it is expected to grow from \$50 billion in 2020, to over \$110 billion in 2024. The worldwide generative media market is expected to reach almost \$398 million by 2025.

03

Generative AI is offering significant time and cost savings for brands and agencies. It costs around \$0.03 to generate an AI image using Open AI-driven tool Dalle-2 in a matter of seconds. Most stock imagery will set you back 10 to 100 times that.



Generative AI is beginning to facilitate new modes of thinking and creative agility. Behind the scenes, many creatives are leveraging AI tools to supplement their creative process, using image generators to fuel brainstorming or find that perfect presentation asset, faster than ever before.

Some pioneering brands are developing full product offerings based around the technology. Siemens, for example, released an AI-based web app to help users discover better system architectures. Microsoft's new product leverages similar capabilities to help non-professionals write code using natural language. Other businesses such as Nestle, PepsiCo and Unilever are finding applications for the technology in marketing and content production. AI-generated imagery, text, audio and videos are beginning to show up in branded content, services and campaigns. To support their Self-Esteem project, Dove recently used deep fakes to illustrate the harmful impact of social media on self-esteem. They created avatars of mums who spoke directly to their daughters; parroting the toxic beauty advice so often consumed via social media. Meanwhile, in collaboration with Wavemaker, the Department of Health and Social Care rolled out their first synthetic voice this year.

Their Breastfeeding Friend voice-activated support tool helps new mums with advice. The featured AI voice allows content to be added and updated in real time and pushed out across audio-enabled digital touchpoints.



Image source: www.nhs.uk

From headlines, scripts and SEO copy to full-blown synthetic voices and speaking avatar videos, generative AI can generate new and usable content without the need for high production costs or long lead times. Even more excitingly for international brands, the technology also powers translation and format adaptation, opening up huge opportunities for scale. Invest in a custom brand avatar or voice and you can instantly generate content across multiple languages at the touch of a button. Got a video or image asset you like? Now you can create endless variants and formats in a matter of moments.

Generative AI is beginning to facilitate new modes of

thinking

and

**creative
agility**

The growth opportunity:

Generative AI is not only helping brands to create compelling content, it's driving cost and time efficiencies in the creative production process too. Studio fees can be limited, and production times can be cut from weeks to days or even hours. In a fast-changing world, this level of creative agility and reduced time to market could be a game-changer for brands looking to maintain relevance.

One of the most promising applications of this tech, however, comes not just in the form of resource saving, but in the opportunities for hyper-personalisation that it will deliver. 'Generative ads' offer the chance for brands to dynamically match limitless versions and formats of AI-generated content with data and targeting signals. This will deliver the holy grail for marketers: cost-effective, high-quality, highly personalised, scalable and optimised messaging to every unique individual.

We saw this with Cadbury India's award-winning work, which used AI video and voice synthesis to realistically dub over the talent to serve millions of video variants matched to a user's location. Conceivably, brands could be facing a future where each digital touchpoint they serve to a consumer (be that an ad, a website or a product listing) has been automatically customised using generative AI to suit their exacting needs and signals.

From impactful content to frictionless customer experiences, Generative AI is already starting to change the advertising landscape and brands that start testing the tools and capabilities now will be well set up for future growth.

3 things to do today...

01

Review your assets, costs, timelines and personalisation strategy.

Look for pain points and opportunities to innovate. Anywhere across the business where content is produced and scaled could be an untapped opportunity for generative AI to support. Build a test and learn roadmap to start assessing the value of the tech for your brand.

02

Consider what your brand persona will sound and look like in the emerging digital future.

More than ever, this technology is forcing brands to consider the question 'what will my brand persona look and sound like' in the future? Wavemaker's Voicemaker research methodology helps brands determine the right voice profile against their brand character. Answering these questions now will help guide investments in this space.

03

Remain conscious of the risks and responsibilities.

Although many tools provide solutions for issues of legal ownership, as with all AI, there is risk for bias to creep in. AI tools are informed by pre-existing data so human sense checks are needed to ensure representation and avoid harm. When using human-like images, transparency from brands is key to avoid perpetuating already well-documented harms associated with all-too-perfect images of our bodies.

Addressability

will fuel the next era of media performance



By Alasdair Pearmund
Head of Addressable



Addressability should no longer be considered an add-on to your programmatic retargeting strategy. With the capabilities of digital channels continually evolving, it is now a cross-channel, through-funnel solution that will drive the next era of media performance.

Addressable technology is enabling brands to create and activate data-driven audiences in channels that were previously only delivered as linear mediums, which is a game-changer for ROI.

The digital media ecosystem is currently 72% addressable¹, meaning brands have the ability to use data to segment and target various audiences across the majority of their digital activity. As the landscape continues to develop, GroupM expects this to rise to 80% by 2025, largely driven by advancements in the AV space.

In a time of increased scrutiny, and where budgets are being stretched, brands need to be actively engaging with the new world of addressable. Rather than hoping that you'll deliver enough impressions to meet your goals, you should be using available addressable capabilities across as many channels as possible to drive relevancy and communicate to the right people at the right time.

With the right data, addressability offers the opportunity to optimise relevance and timing, delivering effective brand engagement at scale and allowing you to connect your product, content or offer with the people who'd be most interested in it. Combining data-driven audience strategy with creative production technology, addressability delivers strong outcomes without compromising scale or wasting advertising budget. It captures consumers' attention at critical moments, establishing a powerful connection no matter how many other brands are vying for their time.

01

Personalisation is no longer a nice-to-have. 51% of marketers say that personalisation is their top priority². Customers now expect it too, with 76% saying they're more likely to consider purchasing from brands that personalise³.

02

Creative production and management platforms enable brands to efficiently scale creative to all audiences, cross-channel. This technology can drive production time savings of up to 90% and allows for mass review and approval workflows⁴.

03

With many consent management platforms now connected to most major ad servers and broadcaster platforms, content can be pushed cross-channel in a rapid, automated manner, speeding up the trafficking process by days and therefore allowing brands to be much more reactive in-market.

¹ What The C-Suite Should Know About Programmatic Media, Forbes, 2021

² The Power of Personalization, Forbes, 2020

³ The value of getting personalization right—or wrong—is multiplying, McKinsey, 2021

⁴ How much time a Creative Management Platform will save you on digital ad production, Bannerwise, 2021



At a broadcaster level, there is a lot of granular, high-quality data available to plan and target ads across. Users need to register for most streaming apps, which provides broadcasters with very rich first-party data on a household level, in addition to what they watch, when, on what devices, and how they engage with advertising, which can then be further overlaid with demographic and geo data. This makes for incredibly rich datasets.

In these cases, leveraging the precision targeting capabilities of digital across connected devices offers greater opportunities for addressability based on the individual or household, rather than the content being watched. And with a more targeted approach, advertisers can drive more relevant, timely and seamless user experiences by matching audiences to creative for streaming.

However, there are still a number of points that need to be considered. Many broadcasters want to firstly own both the data and stack, and secondly, own the responsibility for the quality of the ad. Therefore, in many cases, broadcasters are unwilling to share data with media companies or 3rd party programmatic stacks, which makes it nearly impossible to set up centrally planned, managed, and bought cross-broadcaster campaigns.



This is further complicated with broadcasters not having a common data taxonomy to plan or buy against. However, as these channels mature, sophisticated solutions are now in place that solve these complications, such as Finecast (GroupM's addressable TV solution which enables advertisers to precision target audiences in on-demand, linear and live streaming TV environments). Finecast partners with all major broadcasters to deliver data-driven campaigns and act as a single point of access across a currently fragmented, complex ecosystem, while still providing scale.

The digital media ecosystem is currently **72% addressable**



GroupM expects this to rise to **80% by 2025**



The growth opportunity:

This fast-growing form of advertising is ideally suited to helping brands adapt to the huge changes we're seeing in where and how people consume media. It feeds off data insights, which will only get deeper and more precise as these technologies develop.

Through scaled addressable technology and the ability to test creative across audiences, brands have the opportunity to learn and understand their customer base better.

This will be even more important over the next 12 months, as habits and norms develop through the cost of living crisis. How is shopping behaviour impacted? Who is in-market this year and is that different from last year? Which category audiences can be spared, and which are essential to growth?

All of these questions need answers, because the answers will directly impact brands' activity—from cross-channel budget requirements to creative tone of voice. Fortunately, we have never had more access to data to inform answers, we just need the creative to ask the right questions.

3 things to do today...

01 Understand your data and the capabilities it can deliver on.

With the deprecation of third-party cookies imminent, ensure your first-party data can be fully employed across your marketing activity. This will form a strong foundation for becoming addressable cross-channel.

02 Ensure there is creative flexibility in the assets being produced.

Having the option to scale out your creative and test creative elements will deliver insights for future creative development and ensure relevancy in a turbulent market.

03 Use creative management platforms to simplify the process of creative production.

Strategically developing creative relevancy across your audience will allow you to be present in a complex digital ecosystem and will form the bedrock of great value.

‘Try it on’ commerce is here to stay



By Yara El Saadani
Ecommerce Precision Director

When you hear the words ‘artificial intelligence’ (AI) or ‘augmented reality’ (AR,) the first thing that might come to mind is the 1982 classic Blade Runner—a world of superhuman robots and flying cars.

However, when it comes to commerce, it is less about human-like robotics guiding you in store and more about technology and data-driven shopping alternatives.

AI and AR can help today’s retailers deliver an optimised customer experience online and offline by using collected business and customer data to make better business decisions. Due to the pandemic, our focus on ecommerce has grown tremendously and we have seen a switch to a hybrid shopping model, so retailers need to be different in their proposition to stand out from the crowd. AI and AR can do just that.

MarketingDive states that 18% of global retailers currently use AR innovations in their business model, which includes giants such as Macy’s, IKEA, and Adidas. As well as this, a further 32% are either planning to implement AR or are in the process of doing so in 2023.

01

The beauty and cosmetics company, Ulta, recently integrated an AR-powered virtual try-on feature that lets users try products in real time before purchasing. This enabled the brand to increase sales, decrease the return rate, and skyrocket user engagement by 700%¹.

02

Even one of the hardest audiences to target are buying into the trend. Based on a Satista study in February 2022, Gen Z shoppers were the most interested in AR shopping experiences. More than nine in ten Gen Z respondents were willing to see what a piece of furniture or decoration would look like in their home using AR.

03

An AR statistics study revealed that immersive virtual try-on features help brands to decrease their return rate by almost 30%².

Thanks to AR technology, customers no longer need to visit offline stores to find out if an item of clothing fits, for example. Now, users can seamlessly try on clothes and appliances, and even match desired furniture objects to their bedrooms or kitchens. Two in three customers say they would buy more products if they used AR.

Nike, for example, was able to cement its position as a global pioneer in marketing with its AR app. To help customers find their perfect size, Nike introduced an AR tool that uses your smartphone camera to scan your feet and tell you the exact size you should go for, together with a clear call-to-action to purchase the product then and there.



Image source: Walmart

And in the US, retail giant Walmart launched a new online tool to help shoppers virtually try on apparel before purchasing. The feature is accessible across both its website and app, allowing customers to upload photos of themselves and use the pictures to visualise how clothing items would look on them. Once a customer saves an image, they can use it to view themselves as the model each time they use the virtual try-on tool. The data attributed from the try-ons will also enhance their personalisation to users within suggested products, cross-sell and up-sell opportunities.

It is clear that 'try it on' commerce is helping brands grow.

68%

of UK customers would spend more time online if the brand included AR

40%

would buy more expensive products.

The growth opportunity:

When adopting 'try it on' commerce, instigating a two-way conversation between consumers and brands is the key to growth.

Personalisation is vital in creating an opportunity for brands to have a two-way conversation with consumers—according to research by McKinsey, only 15% of surveyed retailers say they have fully implemented personalisation across channels. According to research by David Kirkpatrick, 71% of TV watchers prefer personalised ads, so why not replicate that online by using already available data such as seasonality, purchase behaviour, life stage and demographics to push personalised messaging? McKinsey omnichannel personalisation research showed that there's a 10-15% uplift potential in revenue and retention from omnichannel personalisation strategies, so we know consumers love it.

Using learnings and insight from AI and AR campaigns can also help marketers push for more strategic campaigns and even impact wider advertising and stock plans. For example, if users are inclined to try on the electric blue sandal model in the month of May, this can imply what level of stock is needed to prepare for an influx of sales, supporting the trend that users are buying for summer months earlier in the year.

The ecommerce industry has long faced difficulties such as restricted reachability, poor end-user feedback, inaccurate search results, a lack of customer trust, little to no customisation, and an inability to replicate the in-store experience. But AR and AI can help to solve these issues in the long run. Brands could, for example, incorporate chatbots on AR or AI tools for direct user-to-business feedback and assistance; integrate real-time reviews from past consumers to enhance customer trust; or recommend other comparable products as is possible in in-person experiences, to name a few.

3 things to do today...

01

Recognise that the future of shopping is virtual.

We know from research by McKinsey that 68% of UK customers would spend more time online if the brand included AR and 40% would buy more expensive products. So, get in a room with your creative, sales, and marketing teams and Wavemaker to get the conversation started on how best to leverage this trend ahead of the competition.

02

Find out what competitors are and are not doing in this space.

Understand the opportunity that is bespoke to your brand and category. It is key to keep an open mind when looking into this space as AR and commerce can come hand in hand, even if it might not seem like it from the outset.

03

Investigate the best-in-class AR partners and get them business-approved.

There are a wealth of tools and technology partners that are launching a commerce AR proposition. With so many in the market, it is key to select two or three that can go through approvals on your side. Ensure they provide end-to-end services, from reporting to best practice guidance.



Using geographical data to go beyond personalisation and unlock relevance



By Sarah Kenny
Managing Partner

The paradox of balancing consumer expectations for personalised experiences against the requirement to use data in an ethical and purposeful manner has never been greater.

Consumers expect brands to anticipate their needs while at the same time want their data used safely and transparently. Consumers have a growing understanding of the value of their data as well as increasing expectations in exchange for sharing it.

When brands do get this balance right, there can be significant and tangible benefits. But it requires commitment. Organisations need to be committed to more considered use of data in the light of consumer privacy expectations, environmental impact and increased regulation.

The rise of walled gardens and the deprecation of identifiers, previously the mainstay of digital advertising, mean there has never been a more pertinent time to assess how data fuels communications.

Consideration should be made to consumer privacy, accuracy and the need for scale. What data should we use, when should we use it and at what level of granularity?

Using data to fuel channel-level personalisation exists across a spectrum. At one end, owned channels like email deliver connectivity and scale of data usage. At the other end, traditional broadcast channels like linear TV, radio and OOH will never offer 1:1 addressability. In between lies 'the messy middle' where most paid media sits, where a proportion of inventory will have an identifier present, but the majority will not.

Tackling 'the messy middle' requires moving beyond an obsession with 1:1 personalisation towards driving relevance. In achieving this, we see the reinvigoration of geography as an identifier to connect disparate data sources.

01

According to a study by Salesforce, 73% of respondents expect companies to understand their unique needs and expectations, and 56% expect offers to be personalised.

02

Research by Wunderman Thompson in 2020 found that 80% of consumers feel they cannot control the security and privacy of their personal data, and 90% want brands to be clearer about how they use their data and want to be given more control over it.

03

A BCG survey revealed that 91% of business executives say that mapping and geospatial data is important to achieving business results today and will be even more essential over the next three to five years.

When identifying how to use data to fuel the right level of personalisation, brands are faced with both technical realities and ethical responsibilities.

The technical reality in addressable is that match rates vary wildly – from as low as 10% to as high as 60% – and walled gardens don't share details, which means that creating a CRM-style experience in paid media is difficult.

These technical hurdles coupled with the increasing consumer awareness about the value of their data means that brands must demystify privacy policies and data usage so consumers can make informed choices about the data they share.

Brands should consider where personalisation is expected and welcomed, and develop a framework to assess how data is used and who they are talking to across 1:1, 1:few and 1:many, based on scale, accuracy, connectivity and purpose.

The use of geography as a backbone to connect data and understand cohorts of people, coupled with context from the paid ecosystem, allows relevance to be created in those channels in the 'messy middle' where brands want to talk to 1:few and 1:many.

GeoGraph is a geography-based technical infrastructure approach being developed by WPP. It will allow brands to use data sources that contain location information, combined and modelled for insight and geo-segment identification. Dimensions like time and aggregated business information such as sales, proximity to store or point of interest, can be added to the known traits of the people in a location. This provides deep insight for efficient and effective communications in the 'messy middle', which is not achievable by solely connecting the profiles of 'known' individuals.

Those brands already using geography to combine data as a basis for targeting in paid media are seeing the benefit. We know from GroupM benchmarks that results from across a variety of sectors see efficiencies in spend of up to 30%, uplifts in brand metrics over 10% and sales over 20%.

The growth opportunity:

Those brands that anticipate the pressure from regulation, technology, and crucially, people's attitudes towards data, are those best equipped to maintain consumer trust.

Ownership and control of your data is fundamental to success – knowing what data to use (and what not to) is critical to preserving and building trust in your brand and advertising.

To fully unlock the value of the data in paid media requires considered application of the variety of data at a brand's disposal, both owned and from the ecosystem. This provides a broad understanding and scalable connection to deliver smart relevance.

Be confident in the use of Geography as an identifier in data usage – it is inclusive for both brands and consumers. It provides brands with a lens to understand all people and their behaviours, because where we are reflects who we are. Peter Rentfrow, 2013 Professor of personality and individual differences at Cambridge University, said: "Our lives are lived out in neighbourhoods, cities, and regions, and the physical and social features of these places can affect the behaviours, thoughts, and emotions experienced."

Communities underrepresented in traditional marketing data collection methods are represented and brands who are not data rich in first-party data are not left behind. Geography provides a privacy safe and identity agnostic future-proof way to connect brands and consumers efficiently and effectively.

80%

of consumers feel they cannot control the security and privacy of their personal data, and...

90%

want brands to be clearer about how they use their data

3 things to do today...

01

Assess the role of data in fuelling communications across paid, owned and earned touchpoints.

Do this against three key principles to ensure it is applied in a thoughtful and appropriate manner: accuracy, scale and connectivity.

02

Identify all the data sources you have in your business to drive insight.

Consider the variety of data sources that exist and look at how they can be combined to inform communications and at how geography can be used to connect them.

03

Consider how data privacy and security is managed inside your business.

Ask yourself a series of questions: do you have the talent and structure to manage data? Are your policies clear and transparent? How much data is too much data? Do you assess data usage based on where it becomes intrusive versus helpful?

People



BREAKING NEWS



The new age of anxiety



By Rachel D'Cunha
Strategy Partner

The poet W.H. Auden coined the term 'the age of anxiety' in 1947 in the aftermath of World War II, when people felt as though the world they knew had been turned upside down and they had little control to change things for the better. Sadly, that sentiment feels all too familiar for the times we're living in now.

Climate change, the COVID-19 pandemic, international instability, and the cost of living crisis provide the stark backdrop to everyday life in the UK. And—unlike the 1940s—the rise of technology, social media and a constant news cycle means that we are bombarded with information, fuelling an explosion of anxiety.

But, popular culture and the arts often flourish in these periods of adversity, as society craves escapism, self-expression, and connection.

The outlook for 2023 may seem bleak, but by aligning with and borrowing from the cues of popular culture and entertainment, advertisers can deliver small moments of distraction, lightness, and hope, to drive commercial growth.

01

Everyday life is more fraught than ever, with research by The British Journal of Psychiatry, across 795 UK GP practices, showing that anxiety has 'exploded' over the last 10 years, and has trebled among young people over the past 20 years.

02

Perhaps counterintuitively, history shows that culture responds by bringing light into the dark. Despite the suffering faced by millions of people, The Great Depression saw Hollywood's film industry flourish, and music and dancing gained immense popularity. Similarly in the wake of World War I, Laurel and Hardy rose to fame, bringing slapstick and silliness to audiences as a much-needed tonic.

03

Laughter is a sign of safety and connection, but people aren't doing it as much these days. The move to virtual communication since COVID-19 hasn't helped; the lack of non-verbal cues and the stilted nature of 'you go, I go' on video calls has hindered our ability to connect. But people want to laugh, together. It's why we have laughter workshops and laughter yoga.



In such undeniably anxious times, it can be tricky for advertisers to know how to respond. When asked, people generally say they don't want brands to 'be funny'—Wavemaker's recent cost of living research showed only 12% of people said they wanted brands to 'use humour', and 8% to 'create content to lighten the mood'.

Understandably, advertisers don't want to be seen to trivialise the current situation or seem out of touch with the mood of the nation, so the temptation can be to join the chorus of doom. Many churn out safe but ultimately forgettable platitudes of being 'here to help' or 'we know it's tough', to reassure customers 'we care'—think of the deluge of ads in the early days of the COVID-19 pandemic, which all looked and sounded the same.

Advertising can be seen as a close cousin of art, fashion, and mass entertainment, and should aim to provide moments of escapism and self-expression in the same way. Both Love Island—everyone's guilty pleasure—and Strictly Come Dancing—a beacon of glitz and glamour—have seen increased viewing numbers this year as people gravitate to feel-good escapism and try to shut out reality for an hour or two.

Brands can play a role in...

lifting the spirits

of the nation when everything feels lost



Image source: itv

Many industry thought leaders are encouraging brands to return to a heartland of entertainment and show business. Orlando Wood, Chief Innovation Officer of System1 and author of *Lemon. How the Advertising Brain Turned Sour*, says brands must "entertain for commercial gain," and Paul Feldwick, author of *Why the Pedlar Sings*, encourages advertisers to lean on popular culture, embrace a sense of performance and appeal to the aesthetic rather than the intellectual.

The growth opportunity:

Advertising is both a mirror and a window to society. It is often crafted to reflect the times we're in so people can recognise themselves and their own experiences within it. But it can, and should, act as a window too—something for people to look through and see a brighter sky on the horizon.

Brands, like popular culture and the arts, can play a role in lifting the spirits of the nation when everything feels lost. This isn't frivolous, it is a critical part of our survival.

Some of the most successful campaigns in recent times have done just this. Off the back of the financial crash in 2008, we saw a surge of creativity through the devices of humour and mass entertainment. T-Mobile's flash mob dance was a shot of pure joy. Using the context of the most mundane daily event (the morning commute) at the most miserable time of the year (January,) it brought hundreds of people together in perfect harmony to dance like everybody's watching, in the middle of London's Liverpool Street station. In a similar vein, Cadbury's Eyebrows ad brought us utter ridiculousness in 2009, deep in the recession period.

When the world was still reeling from the early days of the pandemic, Budweiser bought back their iconic 'Wassup' ad with a quarantine-themed remake. A Budweiser UK Marketing Manager said at the time: "Budweiser has always been a part of popular culture and this work is able to bring lightness to these challenging times in a way that only Bud can—reinforcing its role of bringing friends together, though now at a distance."

Snickers 'you're not you when you're hungry' is a multi-awarding winning communications platform, having amassed 47 creativity Lions across six countries over the past decade. First launched in the Superbowl, the biggest moment of mass entertainment in the world, they went on to activate humour in a range of innovative ways, for example, analysing sentiment on social media and discounting the price of a Snickers when people were most 'hangry'.

As the IPA states: "tickling the funny bone is an impactful model."

3 things to do today...

01 Don't be afraid to bring escapism into dark times.

Data from Kantar shows humour is an increasingly under-used lever in marketing. It doesn't have to be 'comedy', but lightness of touch and gentle humour will help build positive emotional associations with your brand.

02 Synchronize and unite.

Leverage media opportunities where people feel positive and part of something. Mass entertainment moments such as live sport and Saturday night TV, as well as channels such as cinema and outdoor screens, can place your brand in environments of inherent 'togetherness.'

03 Think about how your brand can enable self-expression.

Hope is optimism with a sense of agency. Enabling people to customise or personalise the design of your product, or allowing users to share and pass on feel-good content, are small but powerful ways to enhance the experience of your brand.

The great retreat (indoors)



By Ashleigh Whitehouse
Research and Social
Insights Director

As our pay cheques disappear quicker than ever, retreating indoors and implementing a self-imposed lockdown is becoming more evident across Britain—we are all trying to grapple with rising prices, energy costs, mortgages and rent.

We know that people are feeling the pinch and changing behaviours accordingly. Wavemaker's *Cost of Living* tracker shows that confidence declined significantly between June and September—such a large shift in attitude over a three-month period is unusual to see. We expect attitudes to shift slowly over time, so it's clear that the abruptness of the crisis is causing turmoil as people struggle to get on top of costs in such a short amount of time.

In June, our *Cost of Living* data showed that confidence levels were low at 34%, however in September, confidence levels had plummeted with only 28% agreeing 'I'm feeling confident about my financial future.' This lack of confidence exhibits itself in immediate changes in behaviours across multiple areas—a staggering 81% of people agree 'I'm trying to cut back on non-essential spending'.

Reigning in spend means only one thing—retreating to home with the sofa becoming a safe sanctuary for many once again. Downturns usually see consumers retreat to their homes, but none of us expected to be imposing it on ourselves so soon after the brutal COVID-19 lockdowns.

01

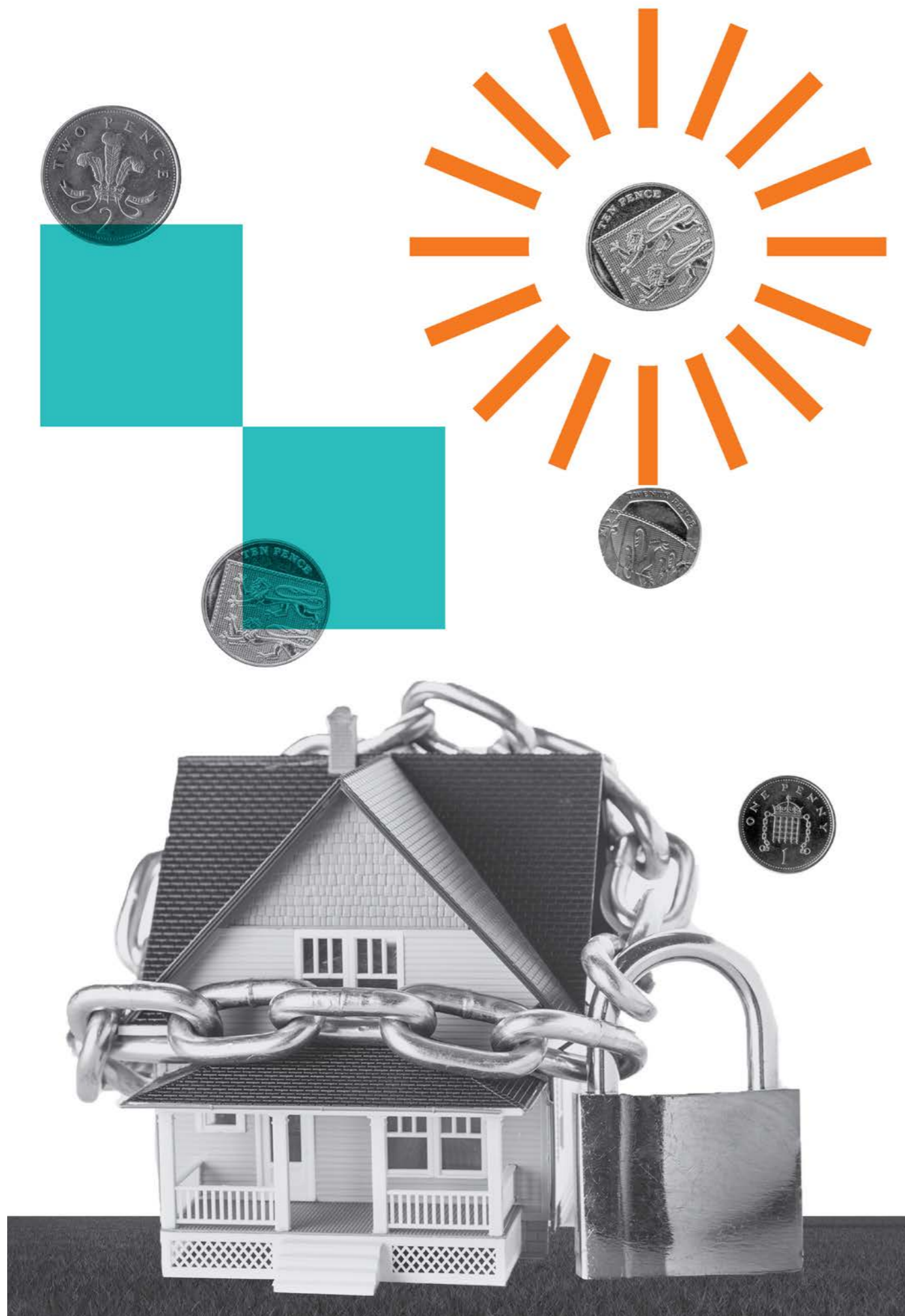
Our research found that people have (on average) implemented eight new actions in the last two months to save money. This highlights that people are taking a multifaceted approach to saving money and there are clear signals that people are focusing their efforts on spending more time at home.

02

Category data from our tracker shows that out-of-home 'treat' spend is being re-evaluated by consumers. It is the easiest expense to reduce to make the pennies go further. The key categories where people are consciously spending less are: Restaurants, pubs, bars and nightlife, takeaways, fast food, paid-for visitor attractions, clothing and footwear, day trips out, personal care and beauty out-of-home.

03

When finances are stretched, many people start to replicate their out-of-home experiences in their own homes. Brands need to consider how they can enhance this experience or 'premiumise' a night in. From food to beauty, as consumers shift to seeking their entertainment and indulgences at home, brands should find ways to maximise their products and services for the in-home market.



People want tangible help from brands. When asked which brands and organisations they have found the most useful for helping with the rising cost of living, the supermarkets and Martin Lewis were by far the most mentioned. This suggests that visible savings and useful advice and tips have been the key to winning the hearts and minds of people so far during the cost of living crisis.

Social platforms are also being used to seek out deals or discover hints and tips. Facebook, Instagram and TikTok were all mentioned as useful sources. But it is worth noting the rise in popularity of TikTok, which was mentioned more than the other platforms in this context.

The number of views for content related to saving money on TikTok is huge (#moneysavingtips – 694 million, #cashstuffing – 671 million, #budgetmeals – 387 million, #shoppinghacks – 196 million,) so this content is certainly capturing the attention of users. With people spending more time at home, beauty influencers are becoming increasingly popular for testing ‘dupes’ of higher-end brands or swapping to in-home treatments.

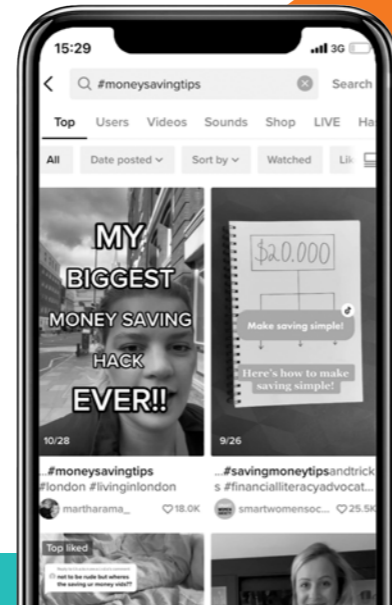


Image source: TikTok

This discoverable content sits alongside ‘fin-fluencers’, which include parents sharing weekly meal plans to feed their families, ideas for free or cheap days out, and budget planning for bills and household essentials.

With people open to advice and help, there is a clear opportunity for brands to be present in these environments and to be part of the discoverable content if they seek out new partnerships with influencers.

The growth opportunity:

As we lurch towards a recession (and possibly a lengthy one) undoubtedly it is currently, and will continue to be, a tough time for many brands, especially if they operate in the out-of-home market such as the hospitality or beauty industries where consumers are already telling us they’ve spent less, and plan to spend less in these categories.

However, as people change behaviours to cope with the cost of living and retreat indoors, other brands will initially reap the benefits of changing consumer behaviours. For some though, it will be more a question of keeping customers and driving loyalty rather than growth. And for those brands that consumers have recently switched to, it is a question of how to keep these new customers once the shock and alarm subsides.

Yet a pivot back to in-home will once again provide opportunities for brands. We’ve seen brands do it before in a downturn – in the 2008 downturn, M&S launched its ‘dine in’ meals for two at £10. This innovative product offer elevated eating at home from the regular and mundane to a small indulgence worthy of the additional price tag.

With many Britons cutting back, it will be a period of difficult sales pitches for many, but for those who acknowledge the great retreat and the sense of cocooning that is rising, innovative approaches will transpire. By thinking about the sense of comfort the home brings, the childhood memories it evokes, with nostalgic meals and favoured brands of old, it could lead to the catalyst of an idea.

3 things to do today...

01 Be mindful of your customers more than ever.

Your audience matters and you need to respond accordingly. The current crisis is affecting all groups of society but in different ways and to varying degrees.

02 The home is a comfortable and safe sanctuary from the turmoil outside.

As people retreat indoors, consider if you can elevate an in-home experience. Make curbing choices feel like a smart savvy action, rather than a consolation prize.

03 Demonstrate tangible ways to support customers.

Build or strengthen brand loyalty while also conveying the emotional and functional value of your products; personalised reward schemes, exclusive offers and price locks offer effective opportunities to do this.

The top 5 actions taken to save money are:

44% trying to reduce energy bills

37% buying less food when grocery shopping

35% going out to eat less

32% visiting town centres and high streets less

33% cutting back on non essential journeys

Masculinity, rewired



By Ed Sellier
Strategy Lead

Masculinity is in a state of flux. A quest for greater equity in the workplace and more balanced responsibility in households has meant that the roles that men play need to diversify. Hans Rosling points out in his acclaimed book *Factfulness* that small changes in a culture compound with time and trajectory. We're in the middle of a series of incremental positive challenges to masculinity in a society evolving steadily away from a patriarchy.

Since 2015, the phrase 'toxic masculinity' has risen in prominence. Yet widespread use risks painting all types of masculinity as dangerous and rotten, at the expense of varied and nuanced.

In July 2022, Welsh scaffolder Jamie Busby called out the Daily Mail after the news platform published a story labelling construction workers "woke" for discussing their feelings with colleagues. His response garnered praise in challenging mainstream narratives that men in manual industries need to close off their emotions to exist within a culture of bravado and machismo.

In this shift, masculinity, or manliness, strives to encapsulate a new code in society—one where all men feel comfortable in vulnerability, rather than stoically feigning achievement, power, and conquest.

01

With two million more UK women in work than in 2010, and growth in top management roles up by +25% (ONS, 2022,) masculinity needs rewiring to account for a shift away from "Default Male," as Caroline Criado Perez writes. It's up to men to adapt themselves to a more inclusive modern work culture built upon merit and collaboration.

02

Research from Amplify's *Young Blood* series on 'Modern Masculinity' showed that 86% of 18-25-year-old cisgender men and 95% of transgender men think men face body-shaming and pressure to look a certain way. The tension between traditional codes of stoic, emotionally compartmentalised masculinity and a more subversive, modern spectrum, is creating space for open conversation and powerful solutions.

03

UK charity Mates In Mind report that men in construction are three times more likely to die by suicide than the national average for men. Mental health advocates like Jamie Busby are critical voices within the industry, destigmatising the perceived weakness in open conversations between men in male-dominated industries.



People buy into brands that reflect them as an individual within a wider culture. The cultural capital this creates builds desirability. With men's roles in society evolving across workplaces and home life, what's important and valued is changing too.

As it stands, brands have a long way to go in representing masculinity beyond traditional stereotypes of breadwinning physicality and grit-at-all-costs. Yet there are some positive examples of brands finding their way in an era of male vulnerability.

In 2007, deodorant brand Lynx ran a campaign showing a young man attracting thousands of bikini-clad cavewomen by spraying himself. Just a decade later, that same brand ran the 'Is it okay for guys...' campaign empowering men to reject the stereotypes the brand had helped create. The brand now ranks second only to Nike in its representation of inclusive masculinity according to young men in Amplify's 'Modern Masculinity' research.



Image source: itv

Perhaps the biggest sign of evolving masculinity lies in mainstream broadcast TV's representation. In October 2022, ITV ran its fifth spin-off panel of Loose Women called Loose Men, featuring presenters Andi Peters and Ore Oduba, street dancer Jordan Banjo and celebrity barrister Shaun Wallace. The panel covered a variety of challenging topics such as men's mental health, loneliness, and body image.

masculinity needs rewiring to account for a shift away from **'Default Male'**

The growth opportunity:

'Brand' is the apex of the marketing mountain, built on a synthesis of the famed Ps and how they show up in a world representing masculinity as an evolving spectrum. Here's how the Ps should evolve for growth, integrating a more modern masculinity.

1. **Product:** The products that succeed in the future will be designed across a spectrum of needs that are often difficult to discuss in open conversation. UK pharmaceutical brand Manual is creating products and consultative services that empower men to deal with health issues such as hair loss, sleep disorder and erectile dysfunction holistically, rather than with a quick fix.
2. **Placement:** Shopping repertoires are enhanced through greater access to brands through vertical and horizontal marketplaces, allowing people to find specific solutions with ease. Testing newer platforms and marketplaces such as Shopify, TikTok and Pinterest will widen the discovery and distribution footprint for men seeking modern solutions in more discrete places.
3. **Promotion:** The era of content creators across multimedia platforms presents opportunities for brands to vary their communication mix. Podcast series such as Dope Black Dads and content platforms like The Book of Man have built new communities and networks of men managing and embracing their vulnerability.
4. **Price:** The spectre and reality of economic hardship is placing huge pressure on all households. Brands should consider additional value propositions (including and beyond price changes) to support people across the masculinity spectrum in coping with rising inflation.
5. **People:** Within your organisation, empower wellbeing and mental health advocates to encourage and support conversation among men, with their female colleagues as allies. In treating masculinity within your organisation in a sensitive manner to motivate the workforce, brands can present themselves safe in the knowledge that they practice what they preach.

3 things to do today...

01 Portray masculinity as a spectrum, not a singular code.

This grants your brand and product access to supporting more men across the vulnerability spectrum. If you have cultural gaps to fill in, be sure to conduct qualitative research to enrich quantitative tracking for whether and how men interact with your brand.

02 Lead and shape the conversation around modern masculinity.

Portrayals in advertising need updating for society to progress. Masculinity as seen through a deodorant-spraying, heterosexual, sex-starved bloke has moved on. Now is your chance to shape perceptions in the world and within your organisation, encouraging open conversations around empathy and sensitivity.

03 Show your own vulnerability.

As we fall on hard economic times, growth at all costs will never foster an environment where vulnerability is accepted and championed. As an employer and product or service for customers, go back through the annals of your brand history to tell stories of your own company's vulnerability and how you overcame it.

Reframing the cost of living crisis as a catalyst for sustainability

Among the turmoil of the last two years, the sustainability movement has begun to gather momentum. Spurred on by the publicised environmental benefits of lockdown (UK carbon emissions reduced by 13% in 2020 vs. 2019,¹) the tireless work of figures like Greta Thunberg and David Attenborough, and the presence of COP26 in Glasgow, there has been a growing recognition of the challenge we all face, and the responsibility we all have.

There was already an intention-action gap when it came to sustainability (a clear difference between people's intended and actual behaviour) but with sustainable choices so often coming with an additional price tag, the added economic pressure that people will be under in the coming months is likely to put sustainability on the back burner. Buying sustainably feels like a discretion, and we're entering a period when all discretionary spending, regardless of who you are, is going to be scrutinised.

Brands have a huge responsibility to drive sustainable consumerism and at a time when household spending will be severely squeezed, how can this period be seen as an opportunity to help consumers make more sustainable choices?



By Andy Collins
Strategy Partner

01

Over 50% of people say they'd be prepared to offset the carbon impact of their flights, yet in a recent study by the University of Bern in Switzerland, only 4.6% of consumers actually chose to do so. We all want to be sustainable, but when there's an additional price tag involved, it's too easy to say no.

02

Since November 2021, the impact of climate change has shifted from the 2nd greatest worry that people have, to the 4th, with rising grocery costs being the primary worry, affecting 68% of the population. The looming cost of living crisis is taking all our attention and focus.

03

The economic situation is going to get worse before it gets better. We know from our own cost of living research that only 44% of people are feeling comfortable financially (down from 49% in June), while only 28% are confident about their future finances. The situation isn't going to improve any time soon, and the world can ill afford a two-year hiatus on sustainability.

¹ Source: ONS, 2021



The increasingly pessimistic environment we're living in is once again growing the intention-action gap (when it comes to sustainability) and driving consumers towards cheaper options.

The majority of adults (58%)² prefer brands that are sustainable, with 60% stating that they "try to buy products that are packaged in an environmentally friendly way."³ The increasing intention-action gap is not driven by a lack of desire, it's a reflection of the current financial realities we're all facing.

Our research revealed that 70% of adults had already changed their shopping habits over the prior two months, with an average of eight actions taken to reduce the impact of the rising cost of living.

According to research by Ibid, this behaviour change is not limited to any specific category. We're seeing it come through loud and clear in every aspect of life—56% of people are spending less on clothing, 30% of people have switched to lower-cost toiletries and 32% of people have started buying own-label brands. People may not be consciously choosing to ignore the sustainable choices, but it's happening all around us.

And so, as we work towards delivering on the UN's 17 Sustainable Development Goals, it is clear that we cannot afford for this movement to be de-railed.



58%

of adults
prefer brands
that are
sustainable

The growth opportunity:

Sustainability doesn't have to come at an additional cost. Brands should embrace the concept of offering sustainability as a gift, baking it into their products and making it the default decision, rather than an optional extra. Sustainability doesn't have to be the driving force behind a purchase, it can just as easily be an added benefit.

With price being a key concern in the coming months, how can brands offer products and services that deliver on cost for consumers, drive growth for the brand, and provide sustainable benefits as well? This holy trinity will enable brands to tackle the upcoming crisis ethically and importantly, ensure that the sustainability movement is not derailed.

At Wavemaker, we believe there are three key areas that brands can embrace in the coming months. Smart brands will drive growth by taking ownership of new markets, giving their products a new lease of life, and exploring new ownership models.

The secondary/re-sale market offers a huge opportunity to lower the price barrier to ownership and reduce the need to manufacture new products. Brands can look to create a mechanism to buy back and re-sell old products, like IKEA's 'Buy Back Friday' initiative, or create a platform to facilitate the onward sale of your products—for example, H&M Group bought a majority stake in Sellpy, Sweden's equivalent of eBay.

Brands can also implement subscription models to again lower price barriers and enable a product to go through multiple consumers' hands. For example, The Toy Box Club offer a subscription toy rental service, helping parents to minimise the clutter in their house, and cater to the limited attention span of their children.

Finally, extending the life of a product may seem like a shrewd sustainability move, but a challenge to economic growth. However, offering free repairs for life is an incredible way to build brand loyalty and showcase the quality of your product, while also delivering on sustainability goals.

3 things to do today...

01 Explore opportunities to facilitate the secondary market for your products.

Either create and own a marketplace to enable this process, or look to invest in an existing platform.

02 Explore new ownership models.

Look at subscription or rental models to lower cost barriers and ensure a single product can pass through the hands of multiple individuals or households.

03 Extend the life of your product in consumers' hands.

Build loyalty and positive brand perception by showcasing the care that you invest in your product and the longevity that creates.

² Source: yg221016 YouGov GB Profiles

³ Source: TGB2210AS TGI GB 2022 October

GROWTH TRENDS 2023



Looking for a better way to grow?

Contact your Wavemaker client lead to find out how we can help you leverage these trends to grow your business.

Or, if you're not yet a Wavemaker client, drop us a line at ukgrowth@wmglobal.com.

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