KANTAR MEDIA

SOCIAL MEDIA
TRENDS
2019

Social Media Trends in Augmented Reality!

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INTRO-DUCTION

40% of the world's population use social media. With some industry reports claiming that consumers on average spend two hours every day sharing, liking, tweeting and updating on these platforms, what does 2019 hold?

Social Media Trends, now in its 5th year, highlights some of the biggest changes in the social landscape and charts the opportunities for brand marketers and communication professionals alike. Making sense of this changing landscape is challenging and increasingly we're seeing a connected intelligence approach where data across all media forms is being directly integrated with advertisers' first-party data; the opportunities are endless!

Today, the sheer dominance of Facebook in social media cannot be ignored. Its properties include the flagship Facebook with desktop, mobile and Messenger applications, Instagram, Whatsapp – and even a burgeoning virtual-social capability in Oculus.

While others like YouTube, Snap, Twitter, Pinterest and LinkedIn challenge this dominance, each tend to be more focused on niche audiences rather than the broad market subscriber base that Facebook has aggregated.

In an environment where regulators are actively challenging Facebook's privacy policies and business practices across Europe and the US, and in China where we are seeing the convergence of social media and user experiences – the key question is: how long will this monopoly last?

How is social media changing for the better? Are the data privacy challenges behind us as brands and platforms alike evolve their relationship with connected consumers?

Kantar Media's Social Media Trends 2019 report uncovers this and more including:

- Social media advertising

- Platform algorithms

- Changing social commerce

- Branded Influencer Fatigue

There has never been a more exciting time in media – we look forward to working together with our clients & partners to better understand this changing landscape throughout 2019 and beyond.

STICK OR TWIST?
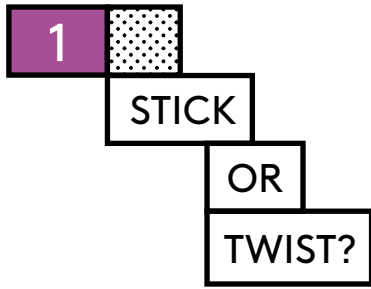
The advertising model reinvents itself

As an advertising-reliant technology company, Facebook has attracted more users and data than ever to be monetised. The figures are overwhelming: according to the GSMA, the social media giant should see its advertising revenue rise to nearly $70 billion in 2019. Knowing that the company already represents almost 20% of the entire digital advertising market, with $54 billion in estimated revenues in 2018, this growth is significant.

Of course, 2018 has been a significant year for Facebook, each day bringing its share of challenges (the fake news scandal, question of Russian interference, the Cambridge Analytica breach, US congressional and EU parliamentary hearings...) plunging the social giant into crisis after crisis.

When there have been crises, however, we have seen the introduction of new practices designed to restore trust: a series of measures against data abuse, information clarification policy for users, a study of applications that could access a large amount of data before 2014, an audit of "applications presenting suspicious activities"... Mark Zuckerberg, has even committed to rewarding people reporting vulnerabilities on his platform.

Snap to discover the trend in pictures

This also involves rethinking its business model, initially based on targeted advertising through data collected about its users. But perhaps easier said than done given that to date 98% of Facebook's revenue is based on targeted advertising. It's difficult under these conditions to envisage its total disappearance. Beyond targeting, there is also the wide range of interactive engaging formats proposed by Facebook and all the big social players. What we called "the richness and uniqueness of the social model" and "new ad experiences" in last year's report. Thanks to original formats like carousels, collections, canvas, lenses or filters that convey the brand elements in a 'fun' and contextualised way, social ads are becoming increasingly personal, interactive, and valued by the consumer. Technological developments, particularly around augmented reality (AR) and artificial intelligence (AI) are rapidly moving from science fiction to reality in digital advertising - and the opportunities are incredibly wide-ranging.

Will infusing digital ads with creativity and technology be enough? Nothing is guaranteed of course, however creative ad formats could help to come out on top. And that's not all: what could really unlock the situation for Facebook is to diversify.

To start with: an additional version with no advertising but accessible by subscription. The idea is not so strange. Our DIMENSION study confirms consumer appetite for this, even if the rise of subscriptions doesn't mean the fall of advertising. For instance, in China, connected consumers have also declared themselves ready to subscribe to a premium social media service in certain cases.

According to a Bloomberg report, this is actually happening. Facebook recently conducted market research to gauge the feasibility of this practice. The social network giant is also testing paid groups and, in 2018, announced a paid version of its WhatsApp messaging for professionals.

This trend is not confined to the ecosystem of Facebook; Twitter is experimenting with subscription offers. One is expected to automatically promote posts on the social network. The other, via tweetdeck, would be reserved for its "power tweeters", with premium features like exclusive alerts for news, further analysis of users etc. LinkedIn meanwhile, has long offered premium subscriptions for its users according to their needs (social selling, job search, monitoring and expertise).
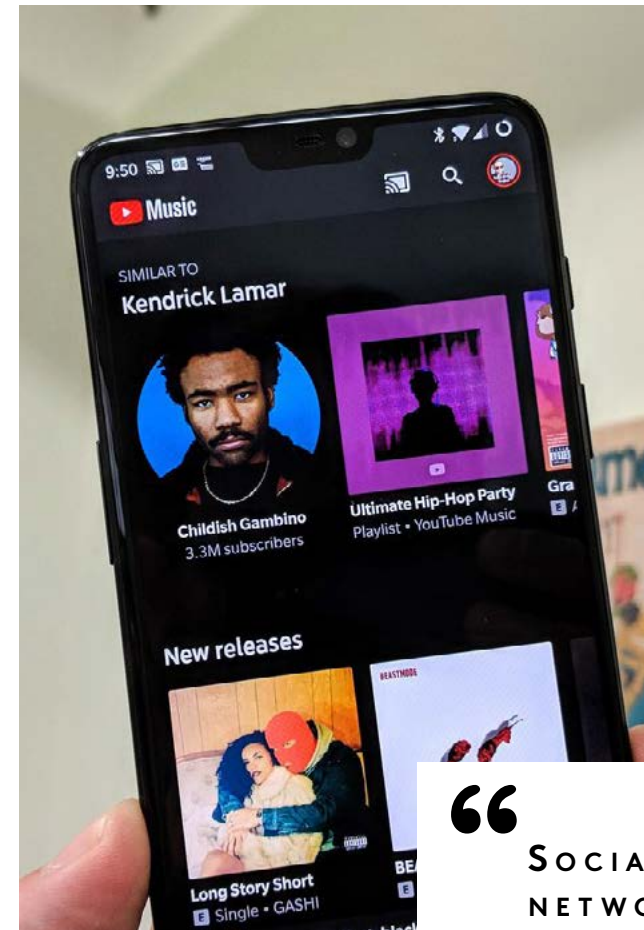
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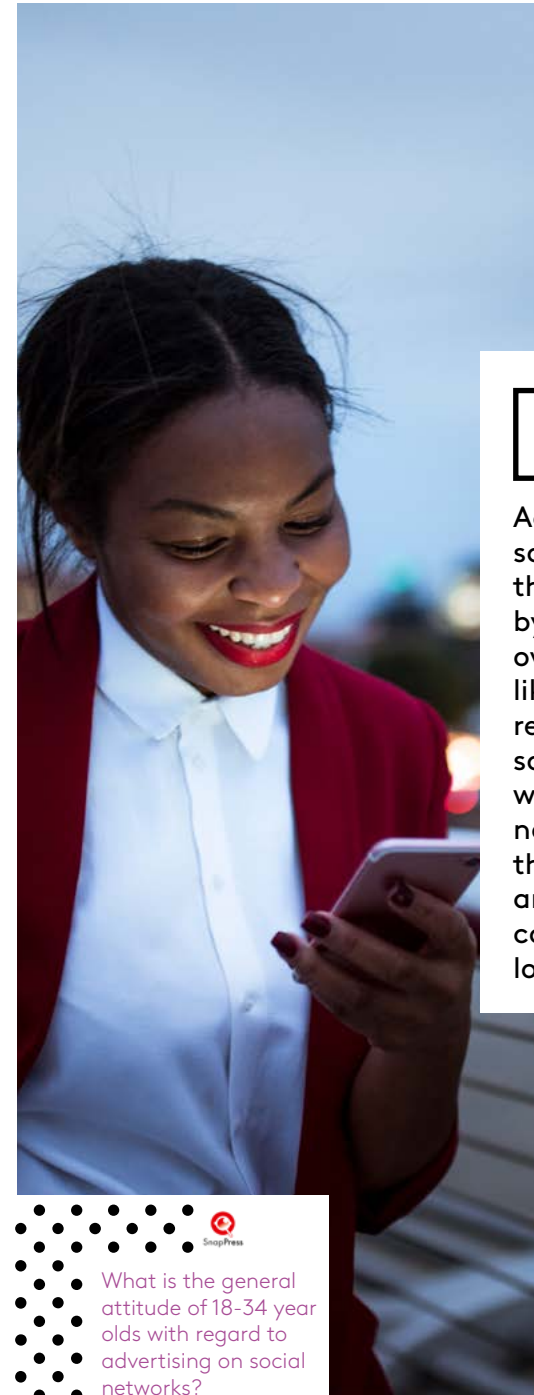
The diversification of revenues is expected to continue in 2019 and beyond, mainly thanks to the net giant's ambitions in hardware. Items on the menu include connected speakers, with voice commands and touch screen. Facebook revealed its pair of smart speakers: Portal and Portal+ last September and is reported to be preparing a hybrid video chat/TV set-top box to be launched sometime in the spring of 2019. It's codenamed: *Ripley*.

Other avenues could eventually also be monetised, like the development of the start-up incubator strategy, of which the first milestone, *Start-up Garage*, was laid in January 2017 in the heart of the Parisian campus Station F. Facebook's research labs in artificial intelligence, which will offer a plethora of opportunities for diversification. While Artificial Intelligence Research (FAIR), Facebook's European hub in Paris, focuses solely on experimental basic research, the Applied Machine Learning laboratory, located near Seattle, favours applied research. Scientific discoveries and new business are key in this field.

And what about the tech giants' space ambitions? Jeff Bezos is already looking to send tourists into space in 2019. Rival rocket company SpaceX, run by billionaire Elon Musk, hopes to send a man to the moon by 2023. Facebook, meanwhile, wants to launch Athena, its very own internet satellite, in early 2019. The objective? To provide internet access to 'unserved and underserved' regions on Earth. So, no doubt that there are still many other avenues to explore...
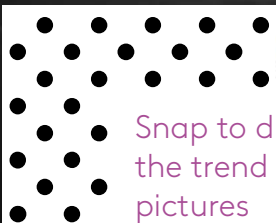
The current crisis may be a fleeting one for Facebook. Beyond the operational procedures already being reviewed, the effort to improve its image has already begun. It may even be the case that Mark Zuckerberg asserts the independence of his other social media offers (Instagram, Whatsapp) even more. Rebranding as Google did with Alphabet, or Snapchat with Snap, could be another approach. A change of name for a change of image?

What is the general attitude of 18-34 year olds with regard to advertising on social networks?

WHY THIS IS IMPORTANT:

Advertising is still core to the social giant's model. However, the diversification initiated by most social networks over several years will most likely monetise and gradually rebalance the turnover of social network giants. Sceptics will then see how much social networks have gone beyond their original framework and become powerful tech conglomerates, which can no longer be ignored.

2 BEYOND ALGORITHMS

A two-speed world of social platforms is emerging

This is not a new phenomenon, yet we are barely beginning to understand its magnitude. The algorithms that underlie our social media experience (and which are not exclusively confined to them) are distorting our vision of the world.

Under question is the intrinsic functioning of these algorithms: do they take context into account, aside from search history or literal semantic proximities? In other words, and as Olivier Ertzscheid, a French blogger and lecturer in information science explains: *"Systematic algorithmization for recommendation purposes has ended up creating almost uncontrollable prescription loops, because they are based on contextual patterns distorted both in the content itself and in the viewing logic that accompanies it."*

To illustrate this phenomenon, Oliver quotes the example of a cartoon video in which *Donald Duck* has made his nephews working in the mine; this could lead to the recommendation of very violent videos on child labour conditions in some countries. Is the consumption of content too complex for an algorithm to grasp, with as much finesse and nuance as human intelligence?

Last June, Facebook announced that they were deleting the «trending» feature, launched in 2014, which mentioned the topics most talked about on social media at any given moment. At the outset, this feature was managed by humans; but in 2016, the scandal broke and it was revealed that the *Menlo Park* firm was accused of manipulating the subjects presented as trends on its site. To stop the crisis, Facebook then entrusted this work to algorithms. But two days after it was instituted, a fake news item made its way into the section. This, along with a series of events, show that algorithms alone can not do the job.

"Today, there is no existing regulation, because the impact of these biases introduced by algorithms is still poorly known" recalls Nisheeth Vishnoi, associate professor at the faculty of Computer Science and Communication at the Federal Institute of Technology in Lausanne. "As a citizen, I feel powerless because I have no control over what is presented to me. I believe that the current situation is dangerous for democracy and that it is essential to find alternatives", he stated in a press release. "Many studies have shown that if you are undecided, the order in which you are shown information and its frequency of repetition will influence you. These algorithms will therefore shape your opinion based on biased data", adds Elisa Celis, an associate professor at the same institution.

Is that inevitable? Not according to these two lecturers who conceived an algorithm that prevents the extreme polarisation of content, by forcing it to be promoted as a point of view opposite that of the Internet user. But this is not enough to solve all the problems. The solution could therefore lie in a partial 'de-algorithmisation' of platforms, for which the current climate is very helpful.

"

IS THE CONSUMPTION OF CONTENT TOO MULTIFACTORIAL AND COMPLEX FOR AN ALGORITHM TO GRASP WITH AS MUCH FINESSE AND NUANCE AS HUMAN INTELLIGENCE?

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According to Kantar Media's Trust in News report, the reputational fallout of the 'fake news' phenomenon has been predominantly borne by social media and messaging platforms. Among the 8,000 surveyed individuals across Brazil, France, the United Kingdom and the United States of America, only one in three recognise social media sites and messaging apps as a trusted news source.

Almost two thirds worry that 'personalisation' will create a 'news filter bubble'. The reputation crisis, the rise of privacy by design, and the entry into force of the GDPR last May provide a more than favourable framework. And if that seems unlikely, think again. Hasn't Google recently announced the arrival of ads without personalisation?

In early September, Twitter in turn announced an option in its settings to disable the social network algorithm and restore the tweets' timeline. Finally, YouTube, subject to numerous controversies by the recommendations made as part of its YouTube kids' channel, also announced last April that its application would be non-algorithmic. Calling into question the economic model of social platforms means that we will most probably see the emergence of paid versions, which can also reinforce this phenomenon by offering "non-algorithmic" versions. This is enough to result in a two-speed world, one with algorithms and another without.

WHY THIS IS IMPORTANT:

Network users themselves are looking for ways to free themselves from the influence of these algorithms. Brands are experiencing a dramatic drop in their organic reach, especially since January 2018, when Facebook announced that he was changing the news feed by giving preference to status updates from friends and family. Other options are also being trialled. For example this last year saw the rise in the popularity of groups. Why? Because they are not subject to the same algorithms as pages. This will undoubtedly disrupt the social administration of pages and alter user habits.
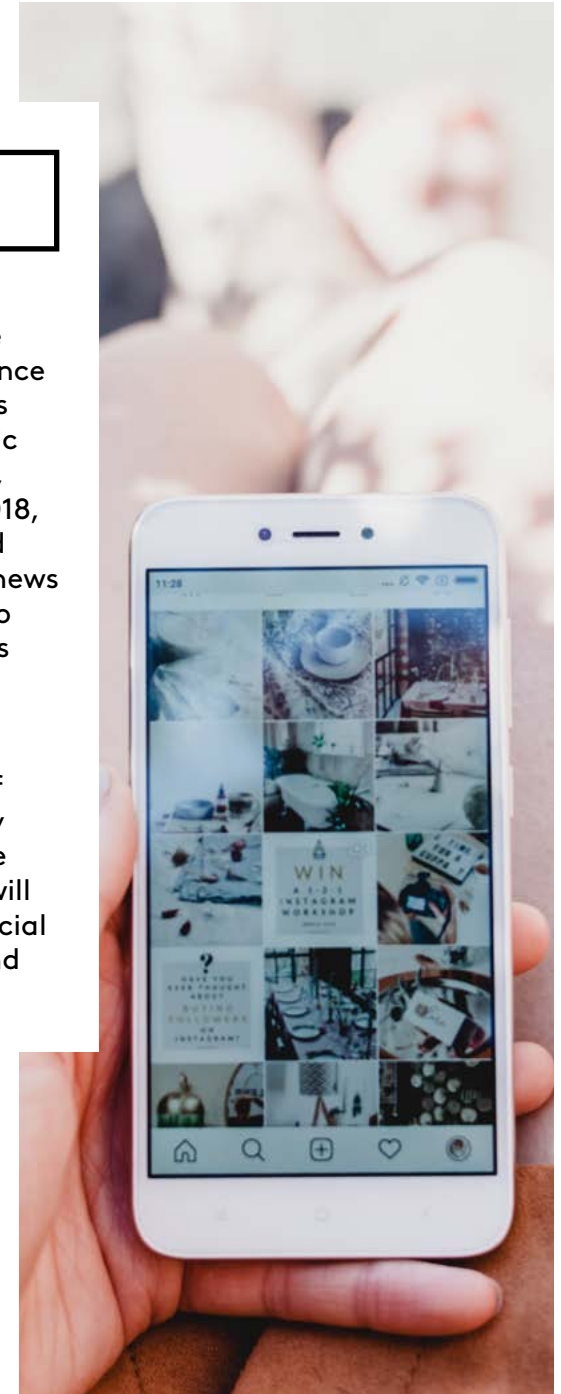
DEDICATED PLATFORMS...

In the age of "Social by Design"

Every year, new platforms and social apps arrive on the market. However, most often these innovative services become overshadowed as quickly as they emerge. So, is Facebook and the others untouchable? Far from it. But the competition is not as tough as expected.

Let's take a look back. At the end of 2015 there was talk of a weak, but very important signal: the emergence of branded social networks. In other words, networks built by brands around their own communities. An often cited example at the time was that of Lancôme and its Chinese social platform *Rose Beauty*, whose design skilfully mixed the look of Instagram, Facebook and Pinterest. But the following years did not bring many examples that confirmed any trend... until the end of 2017.

Late December 2017, the affordable French fashion brand Kiabi launched *We are Kiabi,* a site designed like a social network. Niantic, the publisher behind *Pokemon Go* and the augmented reality game *Ingress*, recently acquired social media start-up Evertoon to add a social layer to its games. Amazon has also launched *Spark*, a kind of Instagram dedicated to its customers, or more recently, a social network dedicated to *Kindl*e users.

However, taking a closer look at these examples, we see that the concept itself has evolved. These are no longer completely autonomous networks, which, unless launched by flagship brands with large communities, would struggle to find a spot for themselves in the sun, but rather a change at the source.

Snap to discover the trend in pictures
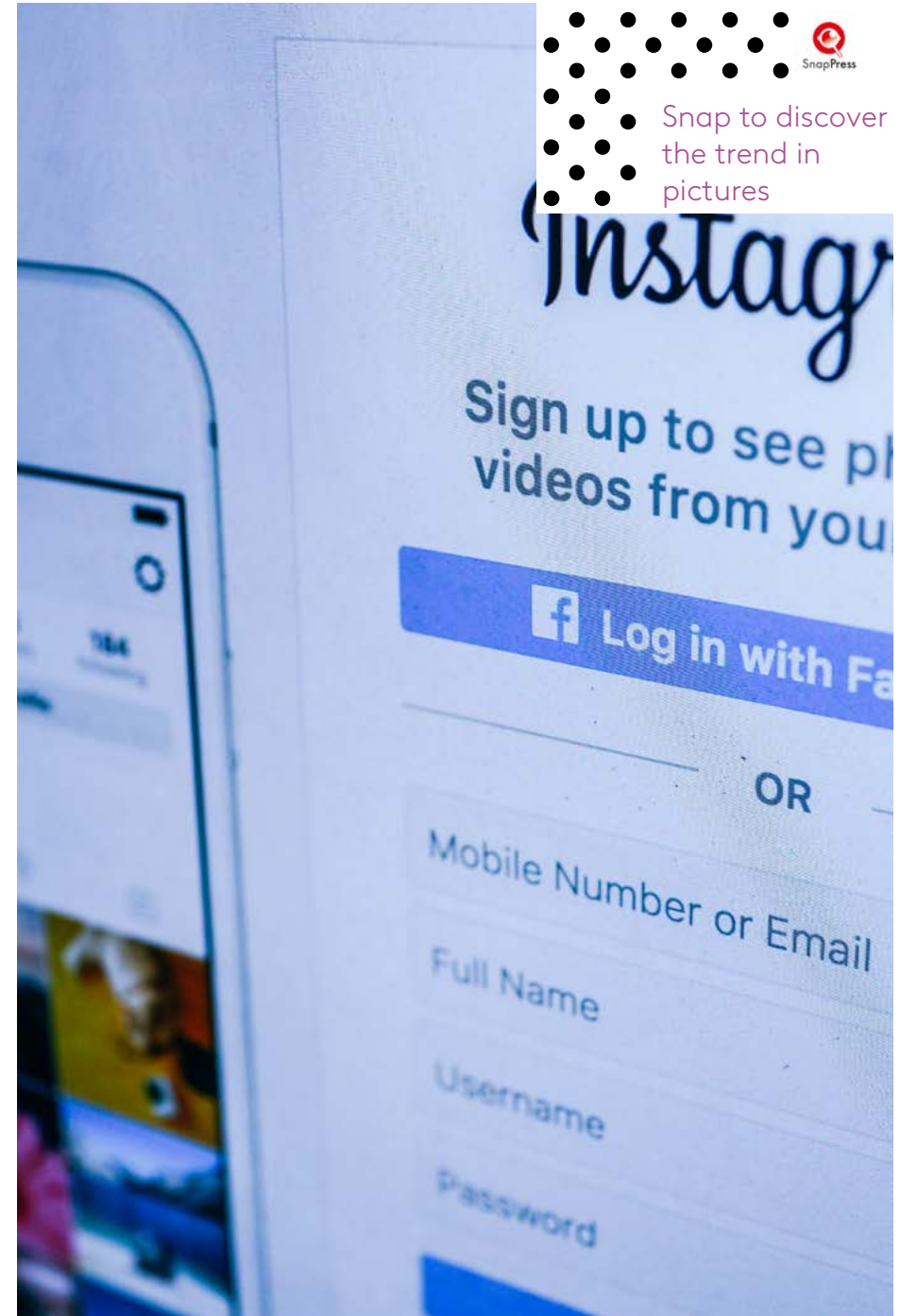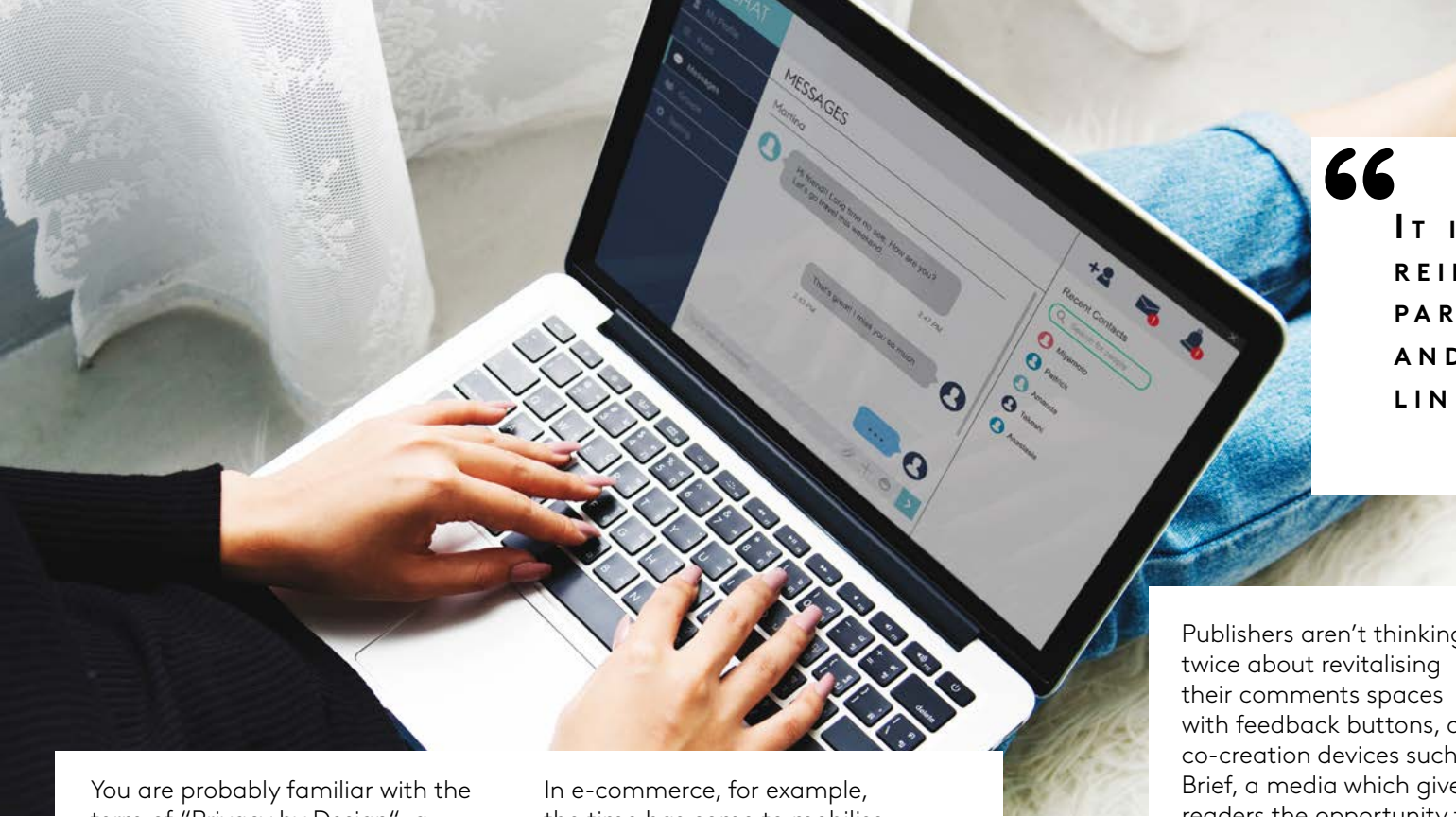
You are probably familiar with the term of "Privacy by Design", a concept with GDPR at it's core, the aim of which is to guarantee private data protection by integration into new technological and commercial applications from the outset.
It seems that the same phenomenon - but in a less coercive way - is taking place in social media, and this is now becoming an intrinsic component, whatever the field. This is a necessary security norm.

In e-commerce, for example, the time has come to mobilise communities: *HowTank* and T*oky Woky* see themselves as "*social networks for sharing experiences that bring customers and brands together to discuss the topics they love*". Via the website, the app, or in-store, internet users can start discussions with other consumers and join a platform to continue communicating with others who like the same brands. In short, it is a kind of community-driven Netflix for consumer-brand relations.

Publishers aren't thinking twice about revitalising their comments spaces with feedback buttons, or co-creation devices such as Brief, a media which gives readers the opportunity to vote on which subjects to be covered in the weekend edition. In short, "social" is no longer the preserve of the major networks, rather it is everybody's business and a key element in a company's success.

WHY THIS IS IMPORTANT:

Brands that have not yet understood how things have evolved, need to reinvest in owned media and limit dependence on the major social media platforms. The aim is not to replace them, of course. With over 2 billion active monthly users it's hard to compete with Facebook. It is a matter of reinvesting in parallel autonomy and strengthening links with audiences.

SnapPress

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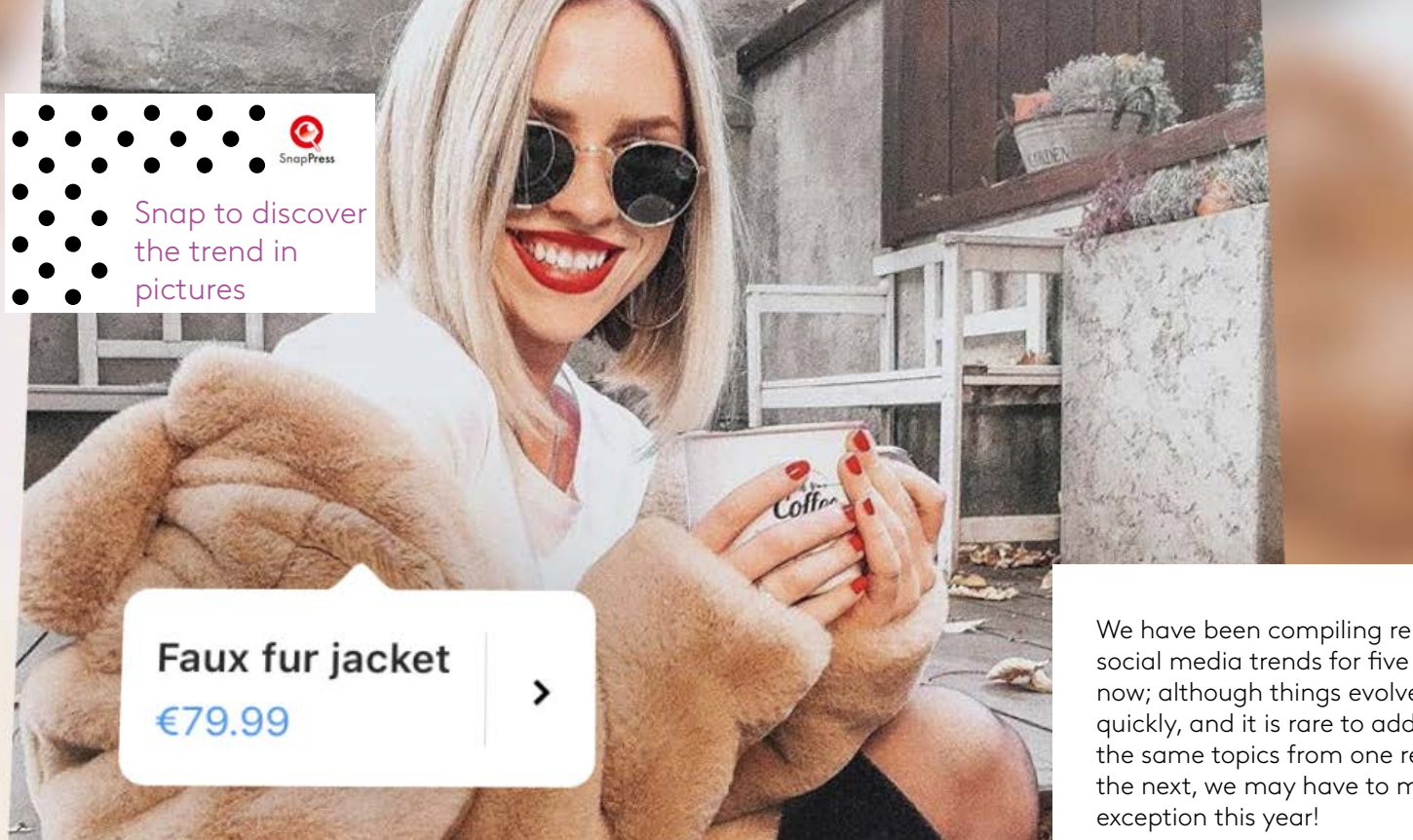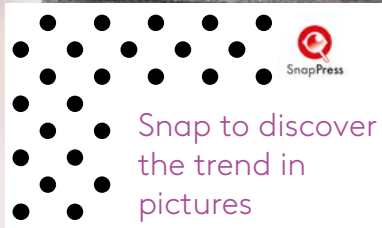
Faux fur jacket

€79.99

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CHANGING SOCIAL
COMMERCE

Multifaceted approaches taking form

We have been compiling reports on social media trends for five years now; although things evolve very quickly, and it is rare to address the same topics from one report to the next, we may have to make an exception this year!

In 2017 we described the uncertainties surrounding social commerce and it would seem the fog is lifting and that not one, but four major approaches are at play.

■ **Adding in-app features: how Pinterest could become the trend**

For several years, the main social platforms have been experimenting by expanding their services in order to trigger purchases. This path, in the end the simplest since it only requires the addition of customer service, has been tested by all sectors bar none.

Facebook, a genuine 360° experimenter, has launched a marketplace allowing users to buy and sell new or second-hand articles through small ads. Facebook has also bet on ad formats dedicated to e-commerce stores. For example? Canvas, which has put advertisers' product catalogues to the forefront. Not to mention the strength of customised and contextual targeting. For example, dynamic ads can be core to a drive to store strategy.

Instagram, the bastion of influencers, has launched Instagram Shopping, a new feature enabling products spotted on its platform to be purchased in one click. The Shopping experience on Twitter, currently in the testing phase, could resemble features close to Google Shopping. Pinterest has not been left behind with "Shop the Look";

consumers can acquire the products they discover on the pins, or even create a shortcut with which to shop directly from their feed. Finally, Snapchat is carving out its unique position with Shoppable AR, through which you can sell products, buy traffic or downloads via sponsored lenses (animated filters that you add to your face live).

Within this climate, as we mentioned way back in 2016, Pinterest, to our mind, appears to hold a competitive advantage, even if it has yet to translate into hard figures, because its model is different. We should note that fundamentally, platforms such as Facebook or Instagram are primarily focused on the improving connections between people, and not generating sales, contrary to the small "catalog of ideas". Furthermore, according to data from a Pinterest internal study, 87% of its users have made a purchase as a result of content found on the platform.

A point made by Tim Weingarten, product manager at Pinterest, in a recent interview: *"Anybody can copy a user interface; it happens all the time in Silicon Valley. The critical difference is the thing that you cannot reproduce or copy, and it is the state of mind. People use Pinterest to carry out something, like a project or intention that they have*

in mind. It's almost like a pre-sale. With the goal of wanting to spruce up your living room, you can change it up through our search interface. You see an Ottoman (couch with a rounded-out backrest) that you like and from that point, it starts coming together".

■ **The app dedicated to shopping, a new approach underway at Instagram... or divide and rule?**

The news remains hypothetical but will not surprise anyone. Following the launch of Instagram IGTV, a new platform hosting hour-long videos aimed at rivalling YouTube, the flagship images network is now looking to launch an autonomous e-commerce app IG Shopping, which would allow registered sellers to sell their products directly. Today, in-app features limit the number of articles bartered, but this autonomous app could dispense with this limit while drawing on the numerous brands present on the platform.
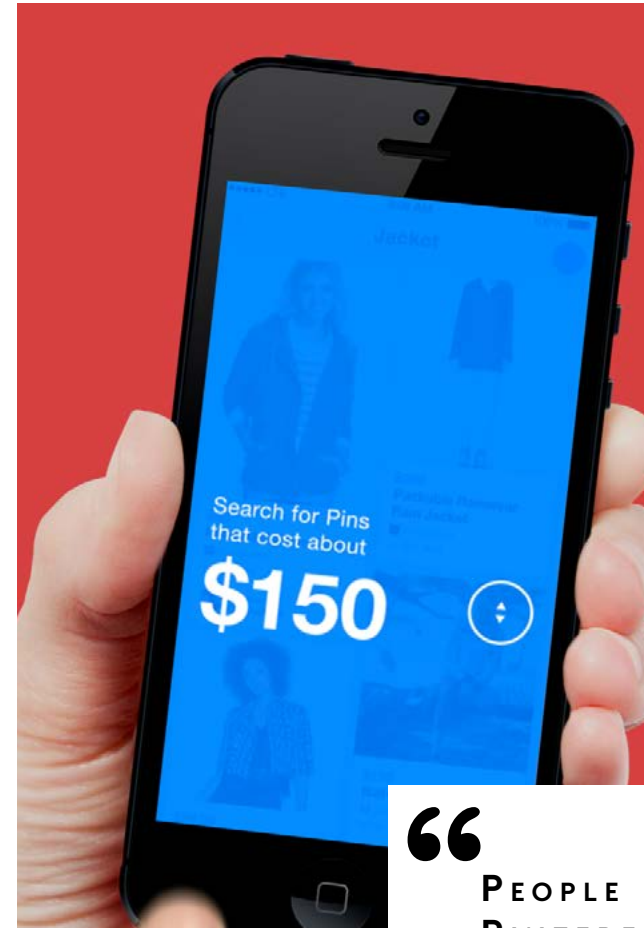
> " **PEOPLE USE PINTEREST TO CARRY OUT SOMETHING, LIKE A PROJECT OR INTENTION THAT THEY HAVE IN MIND. IT'S ALMOST LIKE A PRE-SALE** "

As a reminder, Instagram claims a billion users, among which 25 million professionals and 2 million advertisers, according to parent group Facebook, which undoubtedly has a card to play here to continue its growth, given Instagram's resilience, in spite of various crises. This aspect is of particular interest, as it allows for in-app uses to be divided up so as to dominate the ecosystem, which also recalls the approach of the Chinese WeChat, the market leader and genuinely versatile player.

■ Snapchat continues to surprise us by resorting to the unexpected

"Unexpected": this is the baseline to come from the network founded and run by Evan Spiegel. Surprising us by its creativity since the beginning, it would appear that Snapchat's creative force is not yet ready to peter out. The most recent? Offering a new buyer experience,

the "Shazam" of shopping in partnership with Amazon, one of the e-commerce leaders.

The setup is currently on trial with American users and is due to be gradually rolled out. What is the concept? Film a product you like with Snapchat. Thanks to image-recognition technology, the article is automatically identified, and the user can buy it on Amazon. It is also possible to scan the product's bar code, which is first analysed by Snapchat, then sent to Amazon, which identifies it via its powerful algorithms.

In this partnership, some perceive the first step preceding Amazon's buyout of Snapchat, which is anything but incongruous given the difficult climate currently facing young people's preferred network: financial losses, recurring layoffs, decreasing user numbers.

Which one of these paths will be crowned successful? It is hard to say, as each could potentially work. Yet, a question remains: in social commerce, should the "social" not take precedence over the sense of community?

In China, social network leaders learned how to develop genuine S-commerce setups, where the interaction and interests of communities plays a decisive role in the act of buying. Let us mention Pinduoduo. With more than 200

million users registered in two years, it is the leading Chinese application in the field. By mixing the principles of Facebook and Groupon, the start-up has triggered the fastest growth seen in the country, using a great hook: users spot sales online, then call their friends to buy the products at a reduced price. Beyond a mere recommendation, Pinduoduo is based on a real sharing attitude with your online community. Something from which western leaders should take inspiration...

STRATEGIC
PARTNERSHIPS
# FLOURISH...

Diversification is key

For several years, we have regularly analysed social media leaders' business acquisitions to determine their strategies. This is usually a long-term task: Facebook has made 77 acquisitions since its creation, Twitter has made 51. However, the pace has slowed considerably in recent years.

In 2018, Facebook "only" bought five companies: Bloomsbury, an English artificial intelligence start-up specialising in the fight against fake news, Vidpresso to make videos more interactive, Redkix to compete with Slack, Confirm.io, dedicated to the verification of identity documents, and Dreambit, a personalised image search engine. Among other players, there were few acquisitions to report. Twitter settled for the purchase of Smyte to fight hate content. For its part, Snap has absorbed PlayCanvas, a collaborative cloud platform dedicated to video game creation.

While business acquisitions are down, strategic partnerships are sharply up – and in very different areas. One of the year's most notable is the Data Transfer Project, an open source data transfer project launched by Google, Microsoft, Twitter and Facebook, which should allow users to transfer data directly from one service to another. This is a key issue at the time of GDPR and delivers real added value in improving the consumer's relationship with the Internet, enabling them to have more flexibility and control over their data.

> " **IN THE ERA OF DIGITAL CONVENIENCE, LOW-TECH INNOVATION IS GAINING GROUND** "

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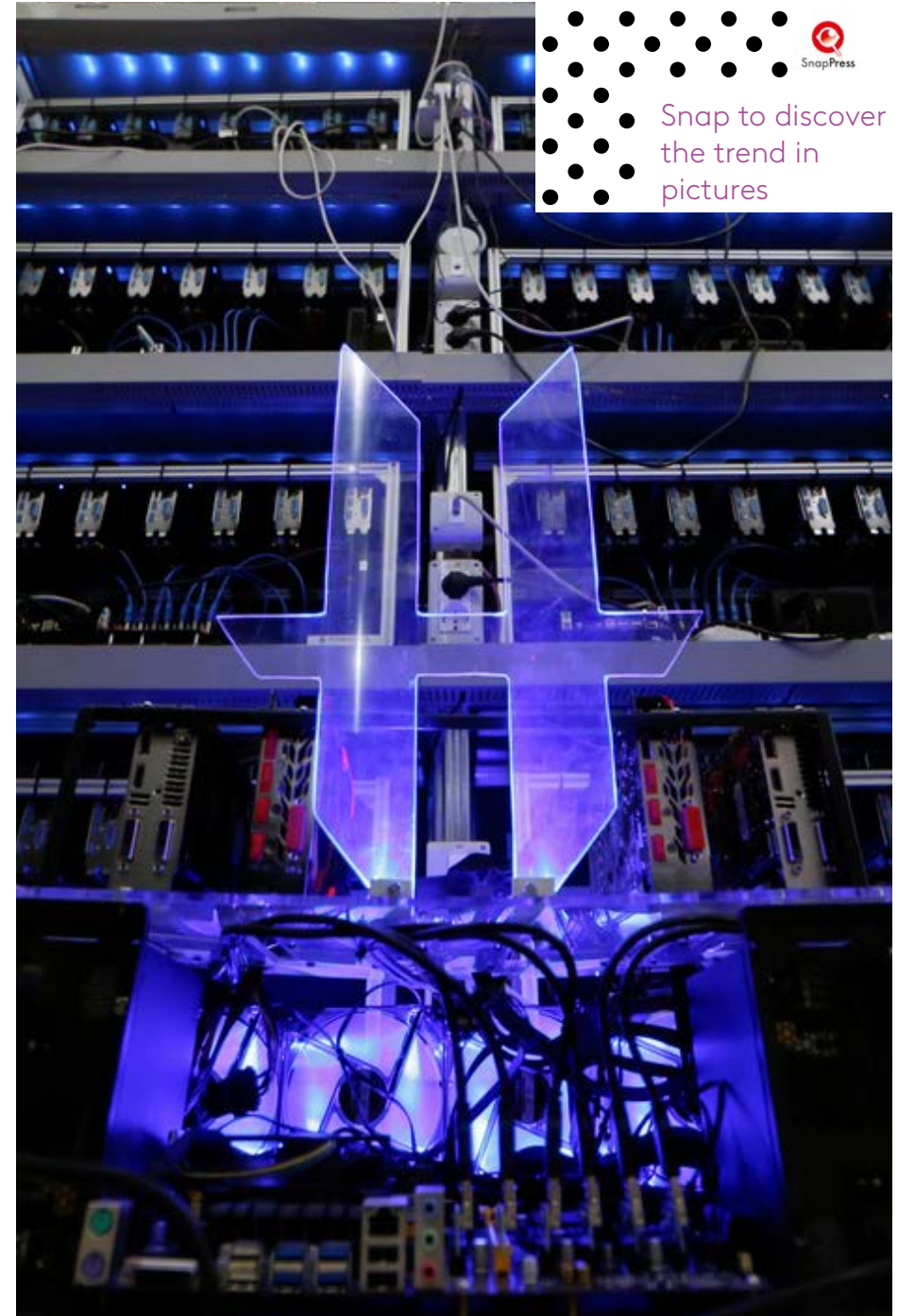
This has been followed by a series of more or less notable collaborations, demonstrating a desire to accelerate diversification. Unity creates strength, as they say. Diversification could very well, given today's difficult context, limit or diffuse the consequences of a PR crisis, which can strike at any time. Some examples:

■ The surprising association between Snapchat and Amazon will launch the "Shazam" of shopping. The Twitch gaming platform, that will bring augmented reality lenses to users on the video-streaming site.

■ YouTube's partnership with Eventbrite strengthens the alliance with Ticketmaster, allowing the Google firm to cover 70% of the US ticketing market.

■ Not to be left behind, Instagram is partnering with Lafourchette, which allows users to make restaurant reservations

> ## "PARTNERSHIPS WILL CONTINUE TO ACCELERATE IN SURPRISING WAYS, AS SOCIAL MEDIA GIANTS INVEST IN NEW SECTORS SUCH AS HEALTH, EDUCATION, BANKING, ETC "

■ Other partnerships, like Facebook with AFP, and Instagram with Project Rockit, aim to address important platform issues such as fake news and harassment.

In 2019, these partnerships will continue to accelerate in surprising ways, as social media giants invest in new sectors such as health, education, banking, etc. And remember once again the systemic approach of these social media giants turned tech titans. But could this model be outdated? In the era of digital convenience, low-tech innovation is gaining ground; Facebook and others have already begun to seek strategies to stake their claim. Is this a paradox?

WHY THIS IS IMPORTANT:

Business acquisitions and strategic partnerships are invaluable elements in understanding the future of social media companies. As we have stated in previous reports, social platforms have become much more than "social"; beyond their large audiences (especially Facebook and LinkedIn), they are building particularly powerful multi-disciplinary conglomerates. Social networks that are lagging behind will be acquired and integrated into one of these empires in the long term. Powerful – too powerful, even? As early as the late 19th century, Nietzsche foresaw: "Thanks to the freedom of communications, groups of like-minded people will be able to meet and build communities. Nations will be outdated". To be continued.

6 BRANDED INFLUENCER FATIGUE SETTLES IN…

How to break the deadlock?

Although influencer marketing has been with us for a long time, it has been brought up to date by the digital revolution and the advent of social networks. The rise of adblockers and the growing mistrust of branded content has led to a major shift; consumers are increasingly turning to their "peers" to inform their consumption choices. Brands have taken note and have learnt to surf the trend, leveraging influencers to boost their visibility and increase their sales.

Initially, brands focused on macro-influencers, and then on medium-influencers before realising that micro-influencers, or even the average consumer, could become a strategic asset: user generated content (UGC) campaigns are more important and prevalent than ever. And one can easily understand why: a ComScore study found that brand engagement increases nearly 30 percent when customers are exposed to UGC. The more authentic this social proof feels, the more trustworthy your brand feels at a glance…

But a large-scale blunder has been committed: influencing was treated like every other marketing channel when it is above all about human relationships and trust. The blame for this mistake goes around. Some influencers gambled too much, taking on several paid partnerships until they started losing themselves, seriously tarnishing their reputations. They are known as serial brand influencers.

" IT IS URGENT TO RESTORE THE IMAGE TARNISHED BY BAD PRACTICES AND GIVE NEW IMPETUS TO INFLUENCER MARKETING

Today's consumer is increasingly less naive, and can spot a paid advertisement a mile away. This is one of the lessons to be drawn from our DIMENSION study: to the connected consumer, most brand activity (through whatever channel and by whichever means) is deemed to be 'advertising'. For example, more than 60% consider brand messages in print articles, on social media or product placements to be "advertising". Some self regulation bodies have reinforced their rules between brands and influencers, for more transparency and loyalty.

Despite this, bad practices continue apace: fake followers, lack of transparency, lack of creativity... and even the rise of CGI (Computer Generated Imaging) influencers and digital humans. Although they could mark an important evolution for advertising, they remain very far from their human counterparts. And it is well known that the human aspect of influencer marketing is key.

A January 2018 New York Times survey shed light on these dubious practices and showed how some influencers bought huge numbers of "likes" with non-existent subscribers, or how some people usurped real users' identities. The situation was so bad that some brands, such as Unilever, took a stand and decreed that they would no longer work with influencers who adopt these methods.

In short, the sector is suffering badly: it's what we call branded influencer fatigue – or BIF. But do things have to be this way? The answer is no.

Influencer marketing still has a bright future. This is proven by the fact that the social networks themselves are improving and expanding dedicated tools. For instance, Facebook and Snapchat have announced the launch of platforms to facilitate brand-influencer relationships. But it is paramount to understand the essence of this discipline. The awareness that began in 2018 needs to continue into 2019 and drive new momentum:

Why does influencer marketing still have a bright future

■ First of all, there needs to be strong cross-functional collaboration within the brands and agencies involved, in order to give the public a unified vision and to lead true all-channel campaigns, where operations from one side feed into the other's, thus creating a virtuous circle. This will then evolve from a tactical approach into a true strategic logic.

■ In the process, more and more brands will bring teams in-house and create dedicated confluence (content and influence) manager positions that interact

with several departments: PR, marketing, products, studies, R&D, senior management etc. According to the DIMENSION study, using multiple media forms to carry conventional advertising messages is now commonplace and recognised as effective by both brands and consumers. On average, consumers reported using almost three communication channels to gather information on brands – highlighting the importance of a holistic, integrated approach to media and communications planning.

■ Then customised operations that ensure compliance with the influencer's editorial line can be rolled out. Many brands mistakenly believe influencers are like a normal communications channel, when in fact they are above all, talents. CEO EMEA at marketing influence software company Traackr, Nicolas Chabot, explains that: *"Most brands neglect the added value they should bring to their influencers and their community. How often is an activation strategy reduced to sampling, an invitation to standardised events, or a sponsored post? The brands that differentiate are the ones that consider their influencers' motivations, what they can give them, and have a long-term vision of the relationship they want to build."*

■ Co-creation will no longer be limited to brand-influencer relations, but to collaborations between several brands and influencers, thus freeing up the creativity of both and broadening the audience base. The role of influencers will evolve toward more brand consulting to optimize campaigns, while preserving their own audiences from an overdose of collaborations.

■ The influencer community should also play a leading role. Tomorrow, more and more brands will rely specifically on a community that will become an intrinsic part of the product itself. Will you sell a community when selling a product? That's the question.

■ As social networks have increased the means to generate engagement (emoji sliders or stickers questions on Instagram, lists or common points on Facebook etc.), the data generated by the communities will be more and more important. It is up to brands and influencers to collect and use them wisely in order to refine market research, development of new products or just to gauge consumer satisfaction.

WHY THIS IS IMPORTANT:

Influencer marketing, a real catalyst for digital transformation, must infuse the entire strategy of the brand and all departments: HR, marketing, communication, R & D, studies, etc. As blogger Stéphane Shultz explained, "the real revolution of the last 20 years is not technological, it is the ability of certain actors to federate communities to scale them up". In short, a matter of influence. This is why it is urgent to restore the image tarnished by bad practices and give new impetus to influencer marketing.

BACK
TO
BASICS!

Maximize social ties and commitment

Established media forms, even before the advent of social networks, have always made a special effort to allow their audiences to react through features such as letters to the editor and comments sections. Not surprisingly, the strength of a media owner is in its ability to know its audience and develop a unique relationship with them.

But comments have their limits. Because, in the end, how many readers leave a comment after reading an article or a post? According to the 1% rule , 1% of internet users create content, 9% comment on and enrich it, and 90% consume it without participating. One explanation for this low participation rate is the commenting process, which is sometimes long and discouraging.

This was the case for social networks in their early days. In an attempt to simplify and shorten the process, these platforms developed single-use buttons, which include "like", "buy", and "make a donation" buttons. This logic was expanded with the arrival

of reaction buttons in 2016, allowing a wider range of emotions, including "wow", "sad", "love" and "angry".

But standardisation and codification have their perverse effect: many brands mis-used these features to try to satisfy social network algorithms. This has led to a tightening of the rules. After punishing administrators of pages devoted to clickbait (titles and content intended to attract clicks), Facebook engineers and moderators began, at the beginning of the year, to target engagement bait.

They do so by penalising artificial engagement techniques designed to generate reactions, such as "react baiting" or "share baiting". This summer the Menlo Park firm also announced that it would strengthen its fight against fraudulent schemes of content sharing between pages. This is not surprising, as Mark Zuckerberg's personal challenge in 2018 is to "fix" Facebook. It's also about generating "natural" engagement.

Snap to discover the trend in pictures

How cute is this?
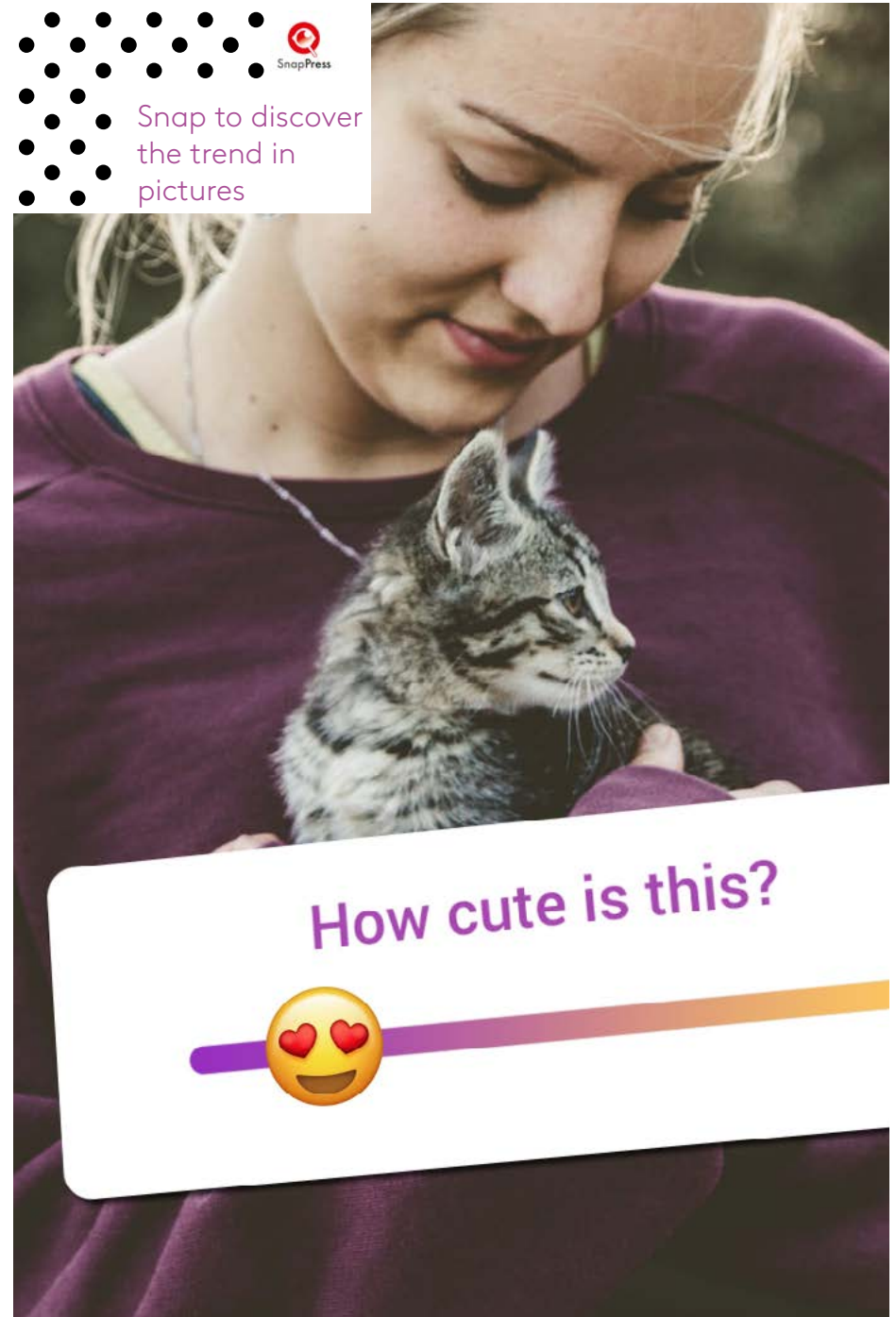
A difficult question for brands is to know when they have shifted to fake engagement. Respecting the limit can be a balancing act. To help brands stay on the right path, social networks have created more features to encourage healthy engagement. Facebook clearly stated this strategy in a long-form article on its newsroom in late 2017 . The main reason for this? The well-being of its users naturally!

The study, conducted by sociologists and other experts, found that when people spend a lot of time passively consuming information – that is, reading but not interacting with other users – they report feeling worse afterwards. On the other hand, active interaction – especially messaging, and commenting with friends and memories of past interactions – is linked to improving well-being. This opportunity to communicate with parents, classmates and colleagues attracted many users initially. It is not surprising that staying in touch with loved ones brings us joy and strengthens our sense of community.

As a result, new features have been developed to reinforce this sense of community:

■ Facebook has launched *Watch Party*, which allows users to watch videos together with friends, tested a "things in common" function to expand users' communication fields beyond their circle of friends, and it launched "interests lists". But that's not all. By renaming *Canvas*, one of

its advertising formats, to *Instant Experience* and adding a whole series of engagement options, such as "the moment form", Facebook also unveiled its desire to make its advertising much more interactive and conversational.

■ Instagram, the land of influencers, has original formats that call audiences to interact, including emoji slider and sticker questions to add to stories on the platform.

■ Pinterest is developing group collaboration tools.

■ Twitter has launched new push notifications to further engage audiences.

■ The messaging app Viber provides a new service called *Viber Community*, with group "limits" of up to 1 billion members — limited only by the number of people registered on Viber itself, which passed the 1 billion mark in 2018.

■ WeChat brought back it's tipping services for WeChat iOS users in 2018, thus fostering interaction and engagement between authors and readers.

Is this a passing trend? We don't believe so! We are entering an era of 'reflective engagement', and developing more and more new features to appeal to users will become critical.

Snap and discover the history of social engagement features

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WHY THIS IS IMPORTANT:

</div>

Community engagement is a crucial part of a brands' online marketing strategy; these mechanisms cannot be limited to social platforms alone. According to a Kantar TNS 366 study, three quarters of consumers surveyed feel that they belong to a community. Also, about half of them are willing to engage in a community created by a brand. For consumers, the need to belong to a community is particularly strong. For brands, the key is to truly understand the meaningful insights in connecting data sets to enhance marketing and data-driven brand communication.

"

THE STRENGTH OF A MEDIA OWNER IS IN ITS ABILITY TO KNOW ITS AUDIENCE AND DEVELOP A UNIQUE RELATIONSHIP WITH THEM "

8

THE YEAR OF HYBRID CREATIVE FORMATS

Diversify your social content mix

Every year sees the birth of a new format. A lot has been said about the video format and its many variants – live and 360° versions, "micro" mode adapted to mobile devices and on the fly - and even all three at the same time. According to TGI Europa data from Kantar Media, for instance, watching and sharing videos is the second main use of social networks after staying in touch with friends and family.

In recent years, some said that videos would totally supplant text formats, a point that we have always refuted in our reports, explaining that the true underlying trend was not the "100% video" format but the "100% interactive" one.

What does 2019 hold for us?

■ Video *content* will still be at the heart of Facebook's strategy, *with the company set to* continue to roll out its Watch service _globally_ . *It is important to remember that*, since its launch in 2017, it *has been restricted **to*** US users. As explained by Fiji Simo, Vice-President in charge of Video at Facebook: "*We created this product so that users are not passively consuming videos but can participate*." Community and interactive experiences remain at the heart of the development of new formats and related services.

■ Twitter, meanwhile, continues to use video through real time publishing and by multiplying partnerships. After Buzzfeed and Bloomberg, Twitter has signed a multi-year partnership with Blizzard to produce and broadcast video content on the *Overwatch League*. While, for the time being, a large majority of video content is sport-related, in 2019, the company could strongly diversify, especially around fashion, music and food. Another strong signal: last September, and for the first time, Apple's keynote was broadcast live on Twitter.

■ Snapchat is increasingly focusing on exclusive video programming to align with changing media consumption trends. A few months ago, Snap announced an agreement with NBC to create a daily Snapchat program called "Stay Tuned" which covers the latest news, in micro videos of 2 to 4 minutes. NBC needed to evolve its strategy to meet audiences and drive revenues in new places. This is not surprising, as Snapchat is the most used social platform among Centennials in terms of average time spent per day, according to a _recent report from Kantar_. The way centennials use social sites differs from previous generations, with Snapchat used by centennials for on an average of 30 minutes per day, compared to Facebook (11 minutes), Facebook Messenger (28 minutes) and Twitter (22 minutes). With a focus on engaging these younger audiences, NBC News has turned toward Snapchat as one of the key components of its future content offerings. It's still TV, but a wider definition – _Explore Kantar Media blueprint to measure it_**.**

Watch a live stream with the SnapPress app

Do we have to stake everything on video?

No. This is one of the lessons of content editor _Buzzsumo's study_ in its August 2018 edition. The American brand analysed 43 million posts on Facebook during the second half of 2018, to find that the average engagement around this type of content had dropped from 5,486 to 2,867 (engagements per post) compared to the first half of 2017. Even though video still has the strongest engagement rate, this engagement has dropped from 9,370 to 3,453.

According to Kantar Media TGI data, when consumers like a media, almost 40% are also willing to access it in different versions.

2019 will be the year of hybrid creative formats. The rise and democratisation of the "*stories*" format powered by Snapchat in 2014, which was a source of inspiration for other social platforms. I n 2019 we expect to see increased use of these hybrid formats for an even better user experience.

But *stories* as we know them will also evolve, with a focus on the audio aspect, which is also experiencing a strong craze. Music podcasts, new music options in videos, sound effects of all kinds... the audio experience will complete the *stories* arsenal for a real immersion of the senses. It is with good reason that Facebook, LinkedIn and Twitter announced the launch of audio clips and audio posts in 2018.

As the battle for advertiser dollars rages largely between social media giants Facebook and YouTube, other digital entertainment properties will be looking to further develop their niche.

Deezer allows song lists to be shared with people and Apple Music across devices. Spotify allows users to connect and share songs or playlists with connections on Facebook, even allow friends to see what they are listening to in real-time. iHeart Radio crosses from streaming to promote live concerts that fill stadiums. On the heels of Sirius XM's US$3.5 billion acquisition of Pandora, we believe 2019 will be interesting to see which players rise to the top, and which may be consolidated.

As you will have understood: diversification, hybridization and creativity with a focus on audio content are on the menu for 2019.

> **"**
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> **MUSIC PODCASTS, NEW MUSIC OPTIONS IN VIDEOS, SOUND EFFECTS OF ALL KINDS... THE AUDIO EXPERIENCE WILL COMPLETE THE *STORIES* ARSENAL FOR A REAL IMMERSION OF THE SENSES "**

Content evolves. From a static and textual format, it has become more visual and interactive before becoming more and more immersive. Hybridization is now the norm in an effort to stand out in the digital hubbub.

THE STRATEGIC AXIS OF ENTERTAINMENT
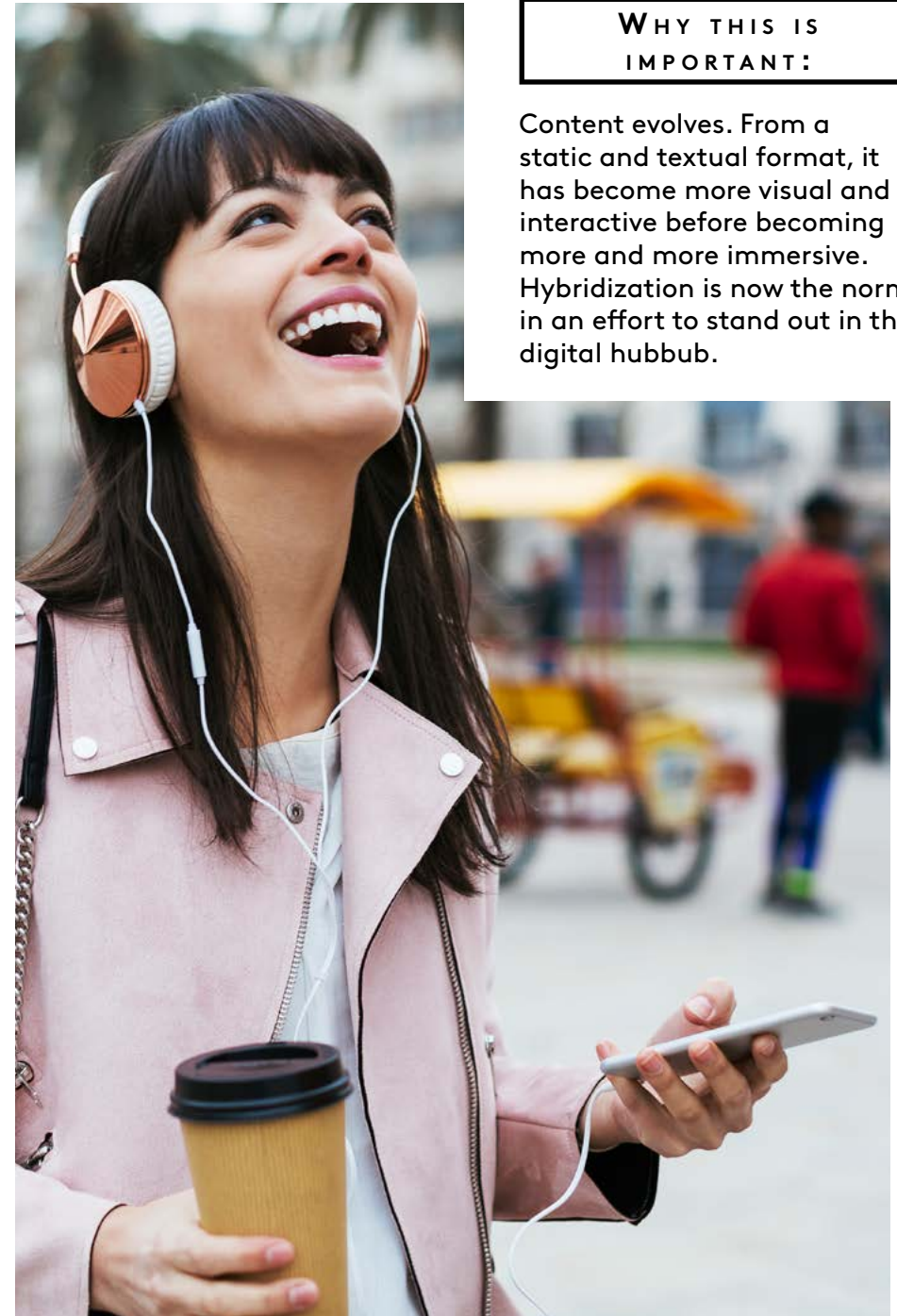
The show must go on...!

At the MIPTV event at Cannes in June, Matthew Henick, Facebook's Content Strategy Director, shared his vision of the opportunities offered to content creators and distributors, namely "social entertainment", through their Facebook Watch platform. Unsurprisingly, the year was marked by the success of applications centered on entertainment. And it is well known that re-purposing successful features from each other is commonplace for social media platforms.

Some examples:

■ Do you know *Tribe*? The French messaging system, which is powerfully intuitive, has already distinguished itself from its competitors. Its USP? Turning short videos into text messages which are easy to create and share. The co-founder, Cyril Paglino, wants to go a step further. He recently unveiled his ambition: to create a *"Gameboy social"*, i.e. video games in chat mode to share with friends.

■ Another application with similar ingredients and which is very popular with Americans, is *HQ trivia*. The idea? Proposing a mobile quiz that resembles a live version of *Who wants to be a millionaire.* It includes game show codes, with a specific air time (3 p.m. and 9 p.m. on weekdays, 9 p.m. on weekends), and a comedy host whose role is to entertain users. What better way to forget the chaos than to have fun? Especially since the game can be monetised in many different ways: brand games via brand content schemes (advanced versions of brand filters on Snapchat), brand sponsored themes, etc.

■ Already mentioned, Pinduoduo: highly addictive and viral, the platform's new features, such as raffles or haggling with friends, bring a real social dimension, as well as a gaming one, to the act of buying.

But big players did not wait for trends to appear to set up their own ventures up.

Snap to discover the trend in pictures

Facebook has already launched interactive quiz-like features in its videos, which are very similar to *HQ Trivia*, mentioned earlier. The *Menlo Park* firm is also reportedly developing a new game advertising format to test apps before they are even installed. And its gaming platform is also in the spotlight. In partnership with the Game Awards, the annual awards ceremony that honours the achievements of the video game industry next December, Facebook has announced the creation of a new award, the *Global Gaming Citizen*, to recognise games that can be used to strengthen the community or make positive global changes.

However, Facebook is not the only company on the market. Last April, Snapchat's parent company, Snap Inc. announced the launch of Snappables interactive lenses that use augmented reality to offer games and new experiences to its users. There are also persistent rumours that Snap is about to launch its own gaming platform.

Meanwhile, YouTube has announced that its gaming platform will close in May 2019. But make no mistake, it is not set to disappear; it will be integrated directly into the main platform. Ryan Wyatt, Global Head of Games on YouTube, posted on Twitter to show that gaming is more important than ever on YouTube. He explained that gaming represents "*50 billion hours of content on YouTube over the last 12 months and 200 million users*

connected daily". That's enough to make you dizzy!

Thanks to Twitch, Amazon is also well-positioned to dominate this new channel. In 2014, the e-commerce giant paid US$1 billion for the social video service and gaming community for good reason. It has flown under the radar of most social tech companies but the service supports live and on-demand viewing of e-sports and chat functions which host a very engaged community. Amazon may have been aiming directly at Microsoft's cloud hosting service (Azure) and it's social gaming community (Xbox) with this purchase – and rightly so. As of December 2018, Twitch boasts 140 million unique users with 15 million active monthly users, all viewing over 240 billion minutes of live-streamed video content. Shockingly, more than half of Twitch users watch over 20 hours of video content per week...

This rampant growth in the gaming industry is due to several factors: the development of entertainment accelerates during economic crises; the crisis faced by Facebook and, in a certain way, all networks, is unprecedented. Another explanation, perhaps more of a long-term one, may lie in the increasing power of automation in the coming years... meaning more free time to entertain oneself? What is certain is that in 2019 and in the years to come, gaming will unexpectedly intrude into our daily lives to create new scripts, new modes of interaction and much more.

> "
> **G**AMING WILL UNEXPECTEDLY INTRUDE INTO OUR DAILY LIVES TO CREATE NEW MODES OF INTERACTION
> "

WHY THIS IS IMPORTANT:

Entertainment is not limited to social platforms. TechRadar reports that Netflix and Telltale Games have entered into an agreement to incorporate games into a movie and TV show streaming service. According to the report, Netflix will launch its video game pilot program with Telltale's popular Minecraft series, Story Mode, as well as a project based on Stranger Things. Media outlets such as the Washington Post are freeing themselves from the conventions of classical journalism through quizzes, poems and goose games that are supposed to bring a new dimension to their writing.
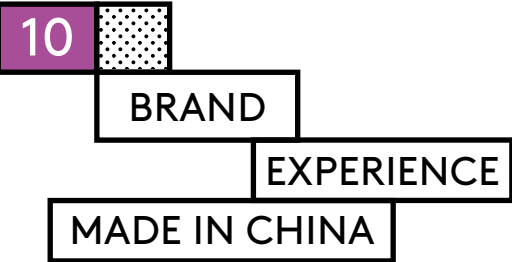
Snap to discover the trend in pictures

10 BRAND EXPERIENCE MADE IN CHINA

Social media interconnects global marketing strategies

In its 2018 report on Chinese trends, Kantar Media CIC, our subsidiary in China, analysed the phenomenon of social media. It explains how its uses have evolved in three successive phases... which overall are very similar to Western practices.

■ Initially, this new channel was used primarily to distribute content intended to increase brand awareness

■ Then brands realised the importance of social media in engaging and communicating with their consumers. At this stage, they were mainly active on core social platforms and widely used key opinion leaders (KOLs). In 2011, M&Ms successfully marketed its brand on Weibo, opening two accounts, "Red M&M" (Hong Dou) and "Yellow M&M" (Huang Dou), and promoted their interaction with the brand ambassador Eason Chan. The original post and shares sparked more than 40,000 interactions (shares, comments and likes).

■ Third phase: as social media comes of age and becomes a core component in marketing, brand investment continues to grow. The goal now is to create unique interactions across different dimensions around the brand experience. This means attracting target consumers to enter and enjoy a comprehensive sensory experience, guiding them to share and gradually expand the circle to reach wider audiences. The key building blocks of the brand's circular experience include: physical stores, offline events, media advertisement, embedded marketing, online distribution, and social marketing. With the development of the Internet of Things (IoT), social media are not only part of the circular-experience strategy, but also serve as touchpoints connecting the other parts in the circle. Its interconnecting role is increasingly important.

Some concrete examples:

■ *Zhihu* **"Tunnel of life": a print advertisement in the subway tunnel linked to the online platform.**

In June 2018, *Zhihu*, a popular Q&A platform in China, catalogued and posted 27 daily life problems encountered in the Beijing subway. Passers-by could use their phones to flash the QR code on the wall and connect to *Zhihu* to discover the answers. This was less a classic advert intended to sell its services, than a subtle and clever way of getting consumers to engage and share their experiences. Triggered by this process, discussions continued in the metro and on other social platforms.

■ *Master Kong*: **mini interactive game embedded with video advertising and discount coupon.**

Master Kong has added an interactive component to its pre-roll advertisement launched on *iQiyi* (the Chinese Netflix): users that had collected 3 emojis by watching the advert received a 12% discount coupon to use on Master Kong's pasta range. While users were validating the coupon, the Web page on display was that of Master Kong dedicated to the online retailer JD.

This interactivity caught the public's attention and encouraged them to use the brand's personalised emoji on social media platforms, and so guide traffic towards online stores to promote sales.

■ **The Coming One Season II + Snow Beer brand and its product Globe Trekker SuperX: the brand gives consumers the power to decide.**

Snow Beer has launched its youth-oriented product Global Trekker SuperX Beer. To promote this launch, it has sponsored the TV-reality show *The Coming One Season II*. At first glance, it seems like classic product placement often seen in various scenes of the show: the choice of drinks in the background of a scene or accessories used to determine the order of the game for competitors. Yet at the same time, most consumers could buy the product and digitise the beer bottle's QR barcode in order to win an extra vote for the show; they could therefore take part in the reality show and change its outcome. Overall, this example of embedded marketing spurred discussion on the products and, in one month, drew in 1.71 million visits to Weibo (China's Twitter-equivalent, micro-blogging social network).

> "
> **THE CHINESE MODEL GIVES SOCIAL MARKETING THE MAIN ROLE OF CONNECTING THE VARIOUS EXPERIENCES**
> "

WHY THIS IS IMPORTANT:

In the West, brand strategies have likewise evolved, and their approach has now moved on from multichannel to omnichannel (in theory at least; in practice, there is still some way to go). The goal is to offer consumers a "seamless" experience. It has therefore been seen by some as a good idea to imitate the Chinese approach, which also aims at gathering together all channels, but gives social marketing the main role of connecting the various experiences from both the digital and physical worlds.

Discover the Social Media Trends 2019 in video

You have a question or comment?

Contact us !

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About Kantar Media

We are a global leader in connected intelligence. Our data and insights provide clients with an holistic understanding of the changing media landscape.

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