

KARLA OTTO

CTZAR

# Marketing in a world of Paradox

GUCCI ANCORA

THE INDEPENDENTS

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# MEET THE TEAM



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## THE INDEPENDENTS

The Independents Group is a global community for industry leaders across luxury and lifestyle, comprising Atelier ATHEM, Atelier LUM, Bureau Betak & Bureau Future, CTZAR, INCA Productions, Karla Otto, K2, Lefty, Probject and The Qode. Providing clients with end-to-end solutions to become key culture brands, the group aligns a global perspective with on-the-ground, local insights. As such, the collective is powerfully positioned to offer streamlined strategy, creative services, talent partnerships, influencer marketing, communications and bespoke experiences for leading brands across key markets, by way of its presence in Milan, Paris, London, Munich, New York, Los Angeles, Hong Kong, Beijing, Shanghai, Singapore, Tokyo, Seoul, Dubai, Jeddah and Riyadh.

## CTZAR

Founded in 2008, CTZAR revolutionized brand-consumer interaction by leveraging word-of-mouth influence from key opinion leaders. In over 15 years, we've evolved into a premier global social media and advocacy agency, specializing in social media strategies and content production across fashion, beauty, and lifestyle. With our extensive network and innovative cultural engagement, we empower brands to boldly venture into new territories.

## KARLA OTTO

Founded in 1982, Karla Otto is a full-service brand-building agency, operating from thirteen cities across the globe. Karla Otto's service is unparalleled. Blending the best of fashion, beauty, design, lifestyle, and arts & culture, we offer a panoramic view of opportunities and the ability to execute complex ideas. Our loyal network and unrivalled approach to culture and community enables us to take brands to brave new territories.



# 2024: Between Staying Grounded and Escapism

## THE PERMACRISIS PARADOX

We have now entered a third phase after the COVID-19 pandemic – from the crisis itself, followed by the recovery phase, to the return to a new normality. However, this ‘new normality’ is anything but normal. The world is currently in a state of ‘Permacrisis.’ War, economic turbulence and shifts in political power are happening simultaneously, transforming reality around us. Consequently, consumers are faced with paradoxes, oscillating between ecological aspirations and jet-setting city breaks, luxury products and financial challenges as well as a desire for discretion coupled with the growing impact of technology.

## CONSUMERS WANT MORE FROM BRANDS NOW

Consumers are a heightened emotional ecosystem, over-indexing on anxiety, fear, insecurity, loneliness and depression. As a result, they’re seeking brands and products that address these vulnerabilities and align with their values. Edelman’s 2023 Global Trust Barometer pinpoints how consumers are looking to brands to establish a human connection, and that they are now the most trusted institutions for consumers, over NGOs, media and governments. This challenges the traditional way of business, carving out an imperative for authenticity, accountability and empathy, while security and safety are a top priority. 2024 has the potential to be a transformative year for brands and consumers alike.

The post-COVID ‘revenge spend’ years have been characterised by rapid growth in luxury groups, but they are now regaining their pre-pandemic behaviours. As a result, brands have to work harder than ever to not only gain commerce, but also consumers’ attention and trust.

## CTZAR + INSIGHTS BY KARLA OTTO: SOCIAL AND DIGITAL EXPERTISE

The digital acceleration has heightened our emotional state, increasing the speed of trend cycles and subsequent market and cultural behaviours. With these myriad of factors at play, Karla Otto’s Insight team partners with social media experts CTZAR to unpick the key strategies that are shaping the state of brand marketing today, showcasing how industry insights and holistic agency expertise at The Independents can help shape your brand for success in this ever-changing landscape.

In this report, we break our insights into two sections to reflect the aforementioned state of paradox: one grounded in reality, the other with a mindset of escapism.

*‘Brands have to work harder than ever not only to gain commerce, but also consumers attention and trust.’*

Enjoy the read,

Insights by Karla Otto & CTZAR

# The Key Drivers Shaping Consumer Behaviour



## GEOPOLITICS

The international geopolitical situation in 2024 is proving particularly complex. The world is weighted with ongoing conflicts and a multitude of upcoming elections which are causing repercussions on global trade patterns and consumer behaviour. Now more than ever, brands must do their best to create either re-assuring messaging, or create a means of escapism.



## SPENDING POWER

On top of record-breaking inflation observed across the globe, ageing populations worldwide are shifting spending power across markets. The New York Times reported that by 2050, people aged 65 and older will make up nearly 40% of the population in some parts of East Asia and Europe, meaning those in the 'working age' and with more disposable income will come from new regions.



### ECO-ANXIETY

Eco-anxiety exacerbates consumers' worries. The year 2023 witnessed record-breaking temperatures and a significant uptick in natural and climatic disasters. This trend persisted into 2024, evident from the onset of the year with the Noto earthquake in Japan and subsequent tsunami warnings, disrupting the travel season for many. Consequently, consumers are becoming more vigilant about the precarious ecological state of the planet, and they demand transparency and trustworthiness from brands in their communication and conduct.



### DIGITAL ACCELERATION

The advancements in technology are creating a divide in consumers' minds. The devices that were meant to connect us and create a democratic means of communication are making people feel lonely and isolated. In 2023, the ONS found those aged 16-29 are 2x as likely to report feeling lonely often or always, compared with those over the age of 70. As a result, new generations are beginning to move offline and in search of more meaningful communities. With this, IRL events will see a comeback, alongside the need for brands to create communities online as well as off.







PART 1:

# 2024 Grounded in Reality

KEY STRATEGY #1

# In Search of Authenticity



## THE NEED FOR GENUINE INTERACTION

With trust now an integral consumer need, there has never been a greater emphasis for authenticity in brand storytelling and social interactions.

## THE TIKTOK INFLUENCE

This has largely been driven by TikTok — known as a platform that promotes authenticity, alongside entertaining content from its platform ‘creators’ who have moved on from the polished, aspirational aesthetic world of Instagram and into the ‘nitty-gritty’ aspects of the every day. It’s widely known that younger consumers, especially Gen Z, are now utilising the tool over search engines, on the hunt for reviews, recommendations and stories from real life.

While celebrities as influencers remain integral to the mix, other personalities are gaining traction for their quirkiness, humour and vulnerability. TikTok’s most-followed creator is Khaby Lame, who rose to fame for his silent commentary on viral video hacks. His success bubbled up into luxury when brands started seeing the potential: Lame reportedly closed a multiyear contract with BOSS to walk its shows and star in its campaigns.



76%

Of survey respondents are bored by global celebrities.

HIGH-SNOBILITY, 2024

68%

Of consumers feel bothered by the amount of sponsored content on social media.

BOF X MCKINSEY, 2023

161.4M

FOLLOWERS  
@KHABY.LAME

+40%

Of Gen Z now use TikTok as a search engine, seeking authentic brand discovery.

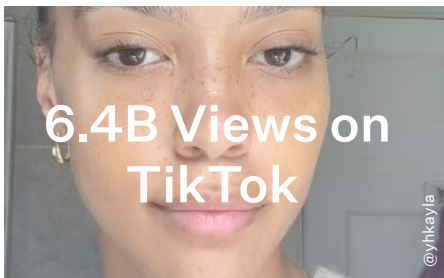
JUNGLE SCOUT, CONSUMER TRENDS REPORT, 2023

‘TikTok is reshaping brand communications. Brands must play to the platform’s culture and trends, rather than try and shape the conversation. This involves relinquishing an element of control and handing the mic to it’s wealth of creators, who are native to the TikTok tone of voice.’

CAMILLE OLIVIER, MANAGING DIRECTOR &  
CO-FOUNDER, CTZAR



# Social Media Trends To Know



Fashion Week. This reopened conversations around natural femininity, sparking new motivation to show beauty as it really is, to escape the frantic search for youth and show oneself in a transparent way.

## #NoMakeup

In October 2023, Pamela Anderson took the world by storm in makeup-free appearances throughout Paris

She has since revealed on Instagram the news of her joining as co-founder and owner of the vegan skincare brand Sonsieskin.



to simplify the daily lives of tired and emotionally drained individuals. The quintessence of this trend, the 'Lazy Girl Job', speaks volumes about the differences in aspirations of the new generations.

## #LazyGirl

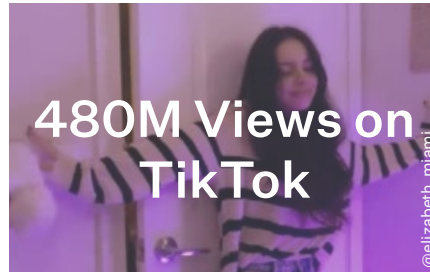
In 2023 on TikTok, 'Lazy Girl' core has officially trumped hustle culture. Popping up as fashion, beauty and fitness videos aiming

They want to work but, having witnessed their parents working hard without much reward, they prefer less interesting but better-paying positions, leveraging new technologies like AI to streamline their tasks.





Image via Unsplash, All social images with permission of creator



### #HappyHouse

In keeping with this quest for truth, some social media trends go even further. The #HappyHouse trend on TikTok reveals, sometimes abruptly,

the challenging daily lives of seemingly happy households. Family disputes, unsanitary environments – many online videos unveil the behind-the-scenes reality, often far from the idealised content of influencers.

It's a striking testimony to the need for truth that internet users can feel, increasingly turning to transparent and authentic profiles willing to share their struggles to make them more relatable.



### #Cringe

Among all social media trends in recent years, the surprising resurgence of 'cringe' stands out. Whether people embrace it or mock it, with the rise

of online communities like CringeCube (157K followers) or CringeChub (1.2M followers), an increasing number of users enjoy discovering TikTok videos where young individuals act out scenarios filmed from their rooms. The cringe phenomenon has even led to popular challenges like 'try not to cringe' and illustrates the curiosity linked to the mundane and strange subcultures on TikTok.

# CASE STUDY: Gucci Taps Amelia Dimoldenberg to Foster Authentic Conversation



**\$4M**  
EMV ON  
INSTAGRAM  
LEFTY, 2023



**12M**  
IMPRESSIONS  
ON TIKTOK

---

**3.1M**   
FOLLOWERS  
@AMELIADIMZ

---

**1.6M**   
FOLLOWERS  
@AMELIADIMZ



## THE POWER OF AUTHENTIC VOICES

On TikTok, humour reigns supreme and those who adopt a self-deprecating, fun-filled tone resonate with the platform's audiences. Championing this style is Amelia Dimoldenberg, known as 'Chicken Shop Girl', who rose to fame via her awkward celebrity-dating series in fast-food chains. Dimoldenberg is now a red carpet regular. Recently spotted at the Golden Globes, interviewing the likes of Jeremy Allen White and Andrew Scott. Her posts reached up to over 10 million video views, proving how popular this tone is on the platform.

## HOW LUXURY BRANDS HARNESS THE TONE

The humour-lead nuance of TikTok can feel like unfamiliar territory for luxury. Luckily, the platform's wealth of creators allows brands to translate marketing authentically. Gucci saw Dimoldenberg's potential and reach, working with the creator across a series of pre-show interviews for their SS24 show, generating 12 million impressions. The partnership showcases that brand's needn't change their tone to garner reach, they merely need to hand the mic to those who are fluent in TikTok.

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60%

Of TikTok users want to see 'funny' or 'entertaining' content - more than any other platform.

GWI, 2023

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43%

Of consumers prefer fashion influencers who are 'relatable'.

BOF X MCKINSEY, 2023



KARLA OTTO CTZR

Image via Getty



KEY STRATEGY #2

# Everyday Pleasures

The search for authenticity is accompanied by a renewed appreciation for life's simple pleasures. Innova's 2023 consumer survey found that 61% of consumers globally say they most commonly choose 'everyday moments of happiness [they] can experience', resulting in a surge in purchasing 'everyday treats' like takeaway coffee. This mindset has been widely adopted across social media platforms, as evidenced by the #LittleTreats hashtag, now at 102.4M video views on TikTok. Some luxury brands have already jumped on the trend, featuring branded coffee cups alongside an aesthetic that reminds people of the every day.



55%

Of UK consumers agree that premium coffee is an 'affordable luxury'.

MINTEL, 2023

61%

Of consumers globally say they look for 'everyday moments of happiness' they can experience.

INNOVA MARKET INSIGHT, 2023



## THE RISE OF EVERYDAY

The real-life appeal has given birth to ‘mundane’ marketing. Led by Bottega Veneta, whose paparazzi campaign featuring A\$AP Rocky and Kendall Jenner went viral in December 2023, this format depicts celebrities running

everyday errands, wearing the brand’s latest pieces in a real setting. In 2024, this aesthetic was taken a step further by GCDS, adding an ‘in-action’ element via spilt coffee shots, and creating a thumb-stopping moment on social media.



Image courtesy of GCDS

## THE ELEVATED PAPER BAG

Balenciaga further cemented the mundane aesthetic during its fall 2024 show in Los Angeles, where models were sent down the Windsor Square neighbourhood carrying branded coffee cups and the latest Erewhon shopping bag collaboration – Erewhon Market is an LA-based upscale supermarket and its inhabitants are regularly spotted with groceries from the store.

‘Social Media KOL’s, once synonymous with flashy lifestyles on Instagram, are now shifting towards relatable figures with the arrival of TikTok’s everyday social grammars. Although brands need to seize this opportunity to seamlessly integrate into consumers’ daily lives, they must do so without compromising their brand image.’

BENOÎT ZERBATO  
CLIENT PARTNER, CTZAR

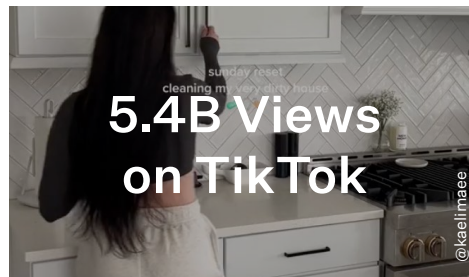
# Social Media Trends To Know



## #LittleLife

On TikTok, users are leveraging the track 'Little Life' by Cordelia to showcase their love for a tranquil life through simple and pure emotions, whether expressing gratitude for family relationships or capturing the serenity of landscapes around them. A reassuring hint for brands: It's not always necessary to strive for the extraordinary when showcasing the ordinary can be equally impactful.





### #SundayReset

The appeal of the mundane is also noticeable through the 'Everyday

Chores' trend. Embraced by lifestyle influencers specialising in cleaning tips and interior design hacks, the trend showcases short and satisfying videos where influencers complete household chores. Most publish it on Sundays, aligning with the concept of 'Sunday Reset', where they dedicate a limited time to easy, mechanical cleaning.



### #LittleTreats

Many influencers on TikTok showcase the 'Little Treat' culture, a reward they give themselves

for accomplishing chores (often related to household routines). For many, this involves indulging in elaborate purchases, such as an \$8 coffee, sweet drinks, or pastries. However, the Little Treat culture has sparked numerous debates, with many believing that it is unhealthy to regularly reward oneself for tasks, leading to potential addictions.

# CASE STUDY: Bottega Veneta's Paparazzi Campaign





Consumers are increasingly hinging their discovery journeys around a mood, aesthetic or feeling, contributing to the continued success of platforms like Pinterest.

In 2023, the paparazzi aesthetic made a comeback via Bottega Veneta's Pre-Spring 2024 campaign, starring A\$AP Rocky and Kendall Jenner. The mood had actually experienced a surge on social media for several years: as early as 2020, Pinterest users began revitalising the trend by searching for the aesthetics of candidly taken photos, akin to those of celebrities, reminiscent of 2000s magazines.

This nostalgia quickly solidified with the return of normcore, a fashion style that advocates for normality, featuring jeans, T-shirts and Converse shoes. In 2023, normcore took centre stage in fashion shows by brands like

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14,9 B

Views of #paparazzi on TikTok.

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Data insights powered by our partner:

**lefty**

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\$3.6M

EMV generated by A\$AP Rocky and Kendall Jenner.

35.8M

Impressions generated by the campaign on Instagram.



Opposite page and above, KENDALL JENNER & ASAP ROCKY

# Community Spirit



157 BRICK LANE  
DOUGHNUT & COFFEE BAR

**BEIGEL BAKE**  
*HIGHSNOBIETY*  
**NOT IN LONDON**      Fall/Winter  
16/02 - 19/02

HOT  
BEIGELS  
ALL NIGHT

BEIGEL BAKE  
HIGHSNOBIETY

HIGHSNOBIETY  
NOT IN LONDON  
FALL/WINTER 2024

## COMMUNITY IS KING

According to a recent consumer survey of over 950,000 internet users, GWI found that one third of people aged between 18 to 30 reported symptoms of ‘smartphone addiction’. Despite our devices being utilized to bring us together, many users are increasingly reporting feelings of isolation and detachment from reality. According to a survey by Hubspot in 2023, more than 60% of US adults are self-classifying as lonely, marking a 7+ point increase since the pre-pandemic era. Consequently, many are actively seeking out hobbies, communities, and friendships in the physical world, giving rise to a new wave of experiences and in-person moments that specifically cater to locality and community-centric brand behaviors.

## THE POWER OF COLLECTIVITY

Meanwhile, positive communities are forming online that harness collective interest. Take the #booktok movement, which has sparked a new generation of readers while encouraging conversation and community. Reading communities can connect both online and offline. For instance, consider Reading Rhythms, a New York-based book club that hosts physical ‘reading parties’ at bars, parks, and local hotspots.

## THE POWER OF LOCALITY

Brands are leveraging this trend by popping up in targeted cities, utilising the area’s distinctive elements and cultural landmarks via pop-ups and collaborations. Burberry collaborated with London cafe Norman’s during London Fashion Week, taking over the traditional British ‘greasy spoon’ with its iconic check and monogrammed plates — talent included local foodie legends such as Mary Berry. This was alongside a takeover of Bond Street’s tube station. More recently, Burberry unveiled a new pop-up in London hallmark department store, Harrods. The launch coincided with an activation on Roblox, tapping into the community that comes with gaming, and merging the virtual with the IRL.

# 60%

Of US adults self-classify as lonely

HUBSPOT, 2023

# 1/4

Of consumers would pay more for a more ‘memorable’ shopping experience.

RETAIL ECONOMICS, 2023

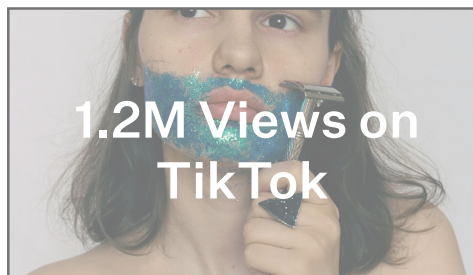
# 40%

Of global consumers say they try and prioritize shopping at local businesses.

YAHOO FINANCE, 2022

Image courtesy of High Snobiety

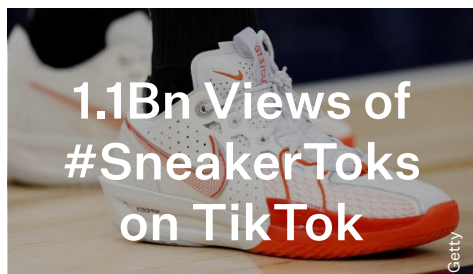
# Social Media Trends To Know



## #WomenEmpowerment

Social media is amplifying nu-wave feminism through the

resurgence of communities and expressions built on sisterhood. Staged by various trends (#PowerPointNight, #GalentinesDay, #BoardNight), women find a greater sense of cohesion online. There is an opportunity for brands here to contribute to this evolving landscape.



## #Toks

TikTok is 1.8 times more likely than other social platforms to introduce users to new topics they didn't know they liked. Take the #SneakerTok community, boasting over 1.1 billion global

views. Creators play a pivotal role in fostering communities and leading the way with creative content. After engaging with creator content, over 2 in 5 TikTok users felt a sense of belonging to the brand's community. To establish a connection with viewers, brands should explore specific niches and amplify the voices that define them and contribute to genuine, authentic conversations online.





Image courtesy of High Snobiety. All social images courtesy of creator

**Clapton**

**Stoke Newington**



**Dalston**

**Shoreditch**



@real\_housewives\_of\_clapton

**#Hyper-Local**

The power of local communities is further evidenced by the rise of hyper-local meme accounts only people from a specific area relate to. In London's Hackney, the Instagram account @Real\_Housewives\_of\_Clapton (130K followers and an engagement rate of 8.14%) resonates with the inhabitant's distinctive style, ultimately landing partnerships with the products that came to define the Clapton-residents taste preferences, such as Perello olives.

In France, numerous communities known as 'neurchis' have emerged, aiming to compare different localities, fostering discussions about the best places in France — this led to a resurgence of interest in forgotten culinary specialties.

“As ‘cool spots’ have become more accessible via social media, it’s never been more important to be a part of a community, or directly associated to a place. There’s serious clout to being a ‘local’. However, while there’s buzz around locality, there’s a counter movement around keeping local nuance firmly off socials, making it important for brands to show up authentically in these spaces, with the right advisory on talent, creative strategy and location.”

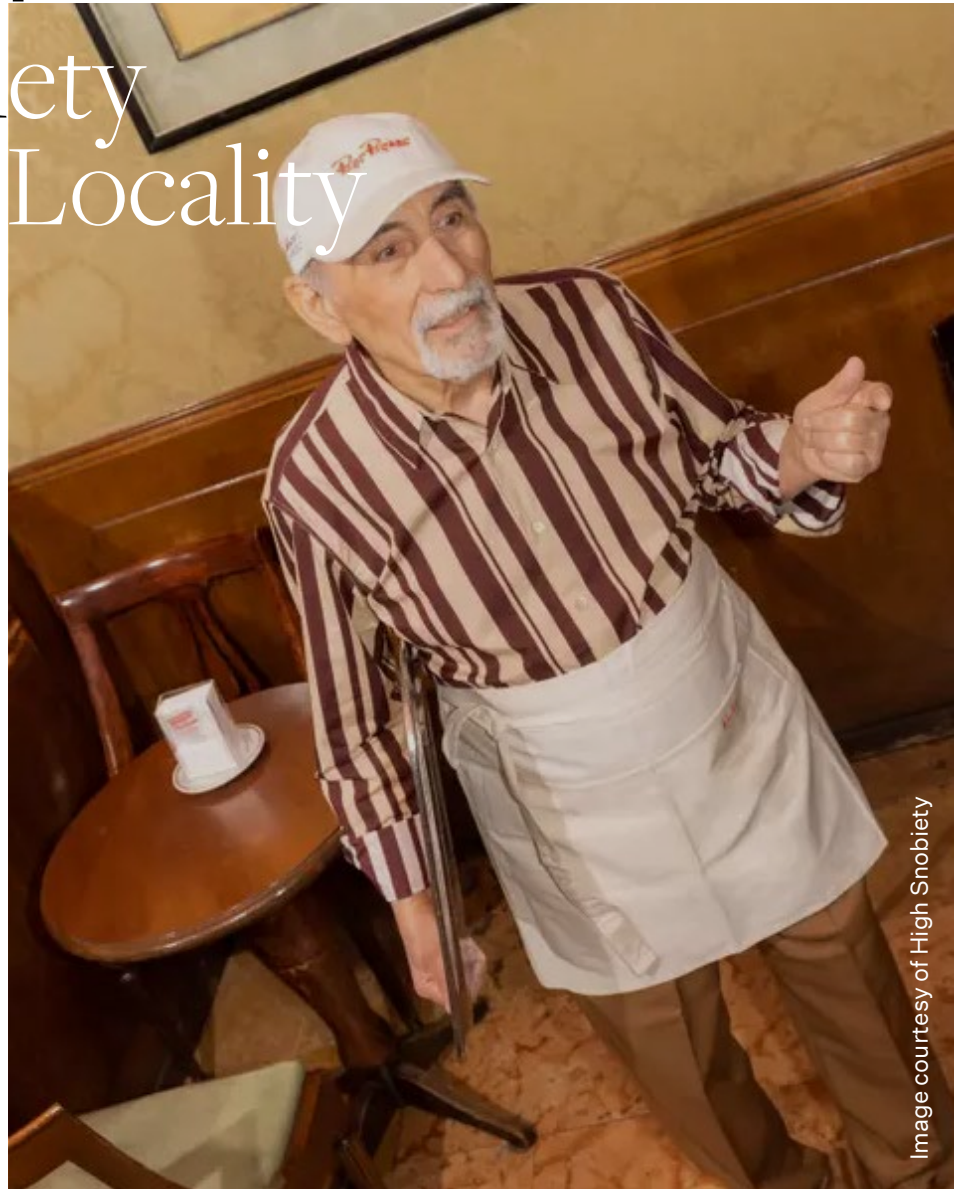
ZOE PATOFF, SENIOR VICE PRESIDENT, DIGITAL AND  
CREATIVE STRATEGY, KARLA OTTO

**CASE STUDY:****Highsnobiety  
Leverages Locality**

In April 2023, during Milan Design Week, media title Highsnobiety teamed up with Milan's favourite night spot, Bar Basso, to realise a collaboration that honoured their infamous Negroni Sbagliato across a series of T-shirts and bags that became synonymous with the week's sparkling social scene.

The collaboration tapped into the local Milanese culture, but especially into the crowd that would typically attend design week. This also followed Emma D'Arcy's viral soundbite citing her favourite drink – 'Negroni sbagliato, with Prosecco in it', which went viral across TikTok. This further evidences how tapping into a wider cultural moment, paired with ingenious local nuance, helps drive the conversation forward.

Since 2020, Highsnobiety has been hosting 'Not In' a series of cultural experiences connecting the title's global audience to the zeitgeist of the chosen cities — usually tied to a wider cultural event



Highsnobiety x Bar Basso

like fashion week.

Throughout London Fashion Week this February, the series has tapped into the city's cultural DNA via various events — think a bird watching session with Flock Together (an outdoor collective for people of colour), a rave celebrating 30 years of Rinse FM, and a

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# 32.4M

Views of the Negroni sound on TikTok.

RAZORFISH, 2021

PART 2:

# 2024 In Search Of Escapism





KEY STRATEGY #4

# Nostalgia



## EXPLORING THE NOSTALGIA CYCLE IN CULTURE

Driven by the compound effect of the permacrisis, consumers are finding today's reality tough to face, instead seeking comfort in the past. This by osmosis, is having an impact on marketing, as brands lean into nostalgia as a core way of connecting with consumers.

Nostalgia is not exclusive to baby boomers: The noughties and nineties have become key references for Gen Z, who despite many not being born in either era, 37% say they feel nostalgic for the nineties (GWI, Gen Z Survey, 2023). This new nostalgia for young generations is defined as 'anemoia' and is touching all aspects of youth culture, from the resurgence of digital cameras to the revival of 2000s subcultures. The intention is not to claim that the past was better; it is not about reactionary nostalgia but rather a positive nostalgia accessible to everyone.

Thanks to its cross-generational appeal, this trend is touching more than youth culture alone. TV shows like Netflix's 'Beckham' and Apple



1990's Supermodels at Vogue World

TV's 'The Super Models' are reigniting interest in 90s celebrities, seen en masse at the SS24 runway collections. Meanwhile, shows and movies such as Gossip Girl and Mean Girls are being re-made, while brands are tapping into iconic cultural entertainment powerhouses via reunions: Walmart worked with the cast of Mean Girls for their latest Black Friday marketing.

37%

Of Gen Z feel nostalgic for the nineties, even if they haven't lived it.

GWI, 2023

55.7B

Views for #90s.

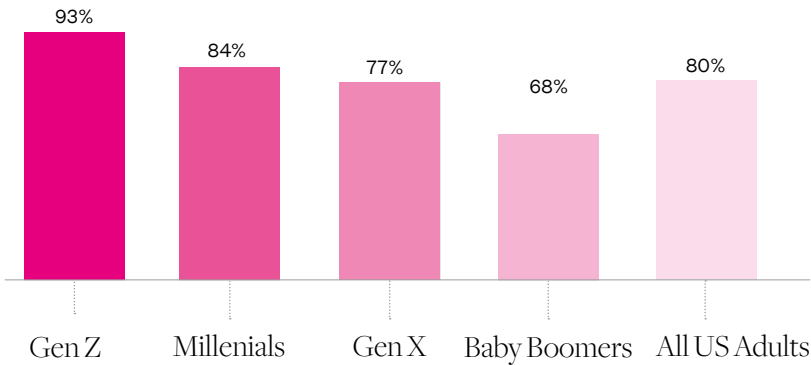
GWI GEN Z SURVEY, 2023

In an era fraught with uncertainty, nostalgia emerges as a soothing balm for consumers across generations. Surprisingly, it's not just the older demographics who seek solace in the familiar; even Gen-Z, are captivated by the aesthetics and ethos of the 90s and 00s. This surge of 'anemoia' has sparked a revolution in marketing strategies; a testament to the timeless allure of nostalgia and its power to bridge generational divides in an ever-evolving landscape.

INSIGHTS BY KARLA OTTO

## CASE STUDY:

# Barbie: More Than a Box Office Hit



Percentage of adults who liked the movie marketing by generation in the US

STATISTA 2023



Warner Bros. Pictures Presents The European Premiere Of "Barbie" - Pink Carpet Arrivals Via Getty

Data insights powered by our partner:

**Lefty**

**\$25.6B**

EMV generated by mentions of @barbie during May '23-Aug '23

LEFTY DATA, 2023

One of 2023's biggest nostalgia successes was the release of the Barbie movie. At \$1.446 Bn, the film became the highest-grossing film of 2023 and the 14th highest-grossing film of all time.

While reminding most millennials what it was like to play with Barbie dolls in the 1990s and 2000s, alongside otherworldly sets and a marketing strategy that painted our feeds pink, the film also increased the visibility and marketing's plentiful product placements.

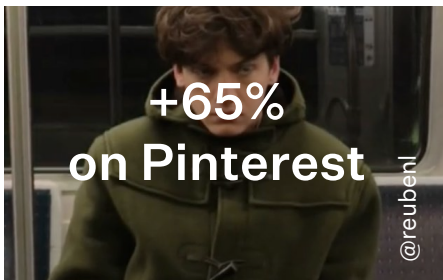
**+124**

Brand activations that resulted from the movie.

LEFTY DATA, 2023

Luxury brands like Chanel and Louboutin have partnered with Warner Bros. Pictures, the production company behind the Barbie movie, to showcase their products in the film and dress the cast for red carpet events. One clear winner is Birkenstock, whose Arizona sandals have been propelled in the zeitgeist since being featured in the scene with 'Weird Barbie'. The company reported an uptick in sales and hereafter filed for IPO, while Google searches for 'womens Birkenstocks' increased by 518% in the UK.

# Social Media Trends To Know



## #Grandfather Trend

Pinterest Predicts 2024 highlighted the 'Eclectic

Grandfather Trend', pointing out how 'our gramps' have become younger generations' style references. Searches for the grandfather trend across the platform have increased by 65% and vintage accessories searches such as 'personaised jean vest' have grown by 355%.



## Kitschens

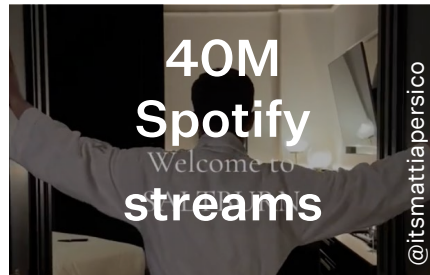
Kitsch is back! The duo Josh and Matt Design on TikTok gathers a total of 2.2 million followers, as they're renovating

their house with vibrant colours and 70s-inspired pieces. A trend confirmed by the 2024 Pinterest Predicts: interest in 'Kitschens' shows newfound passion for both kitsch and kitchens. Research of 'eccentric kitchen' soared by 160% and 'kitsch kitchen' by 75%. To succeed, it is all about bargained treasures recovered from yard sales and pop colours to convey playfulness.





Image via Unsplash, All social images with permission of creator



### **Murder on the Dancefloor**

2024's most-talked-about movie Saltburn propelled a hit song from the 2000s: Murder on the Dance Floor by Sophie Ellis-Baxtor. The end scene

of the movie depicts Barry Keoghan dancing naked to the song, inspiring a wave of content creation from fans on TikTok, staging themselves into liberated dance moments to the 22-year-old hit.

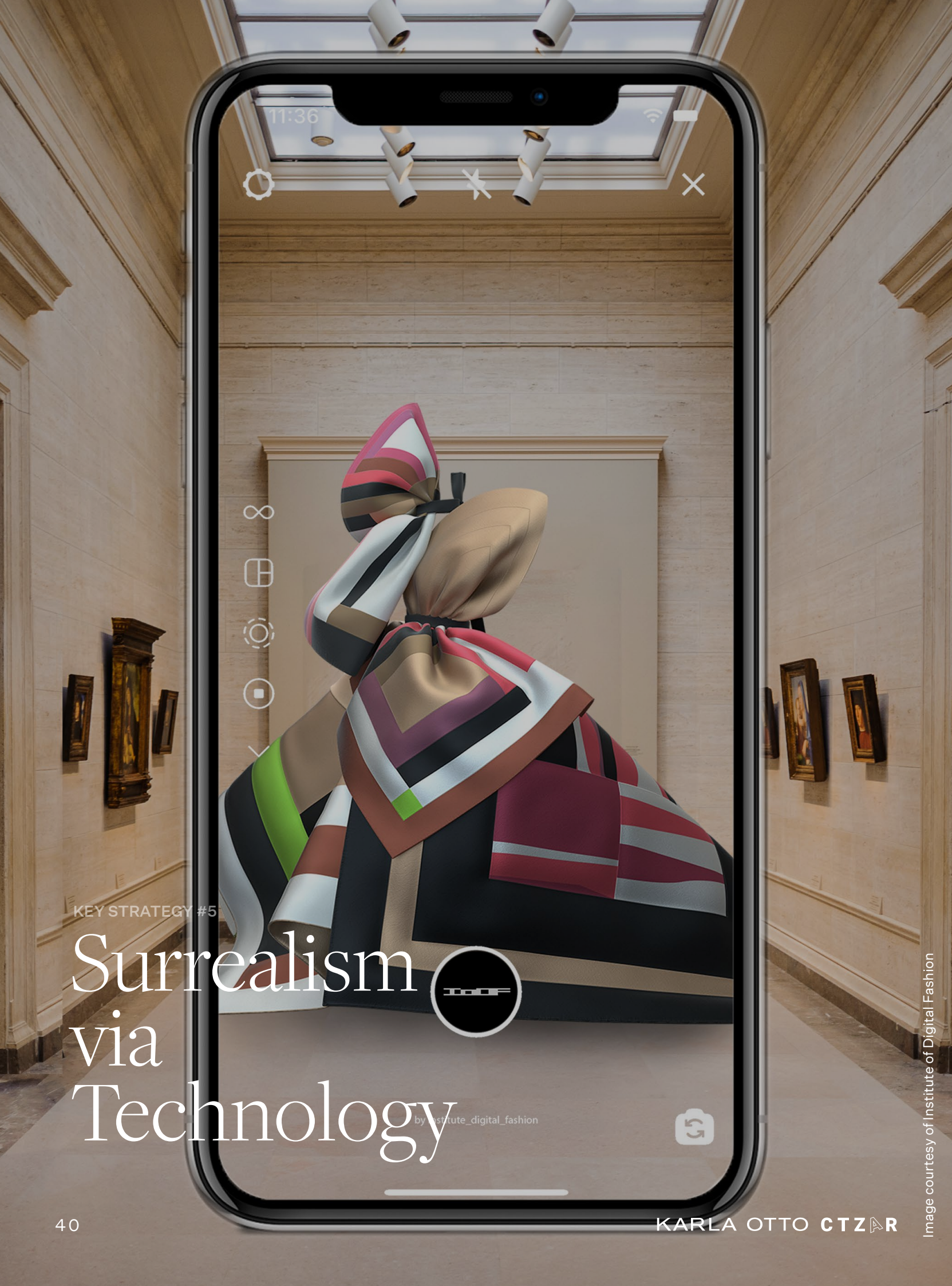
Plot twist: in January 2024, amid rows over deals, Universal Music announced the removal of its music catalogue from TikTok, preventing people from using songs like Murder on the Dance Floor for their videos.



### **Yearbook**

Nostalgia is also being fuelled by innovative new tools such as AI. In 2023, artificial intelligence created filters that became viral on social

media, allowing users to see themselves transformed according to nostalgic pop culture themes. The most successful was the Yearbook Trend, where each internet user could see their portrait in the style of a 1990s American yearbook. Artificial intelligence, beyond feeding nostalgic inclinations, is a powerful tool to create and recreate different realities.



KEY STRATEGY #5

# Surrealism via Technology

by institute\_digital\_fashion





‘Digital innovation is not one-size-fits all. It’s a customised strategy that varies based on brand goals. Some focus on leveraging new social platforms, others bridge physical and digital with CGI campaigns. And for those targeting the Web3 audience, it involves exploring platforms like The Sandbox, Roblox gamification, and brand-owned virtual avatars.’

UNSAH MALIK, STRATEGY DIRECTOR,  
BEAUTY & DIGITAL INNOVATION

## HOW TECHNOLOGY BLENDS REALITIES

The rise of AI and AR has birthed a new visual language, shifting the world of art, design and subsequent advertising and activations. This type of direction is especially relevant to Gen Z who have grown up in blended digital realities.

Graphic designers have been quick to adopt a new set of tools. Joann (@jooooo.ann) is one such AI artist whose work has hit the zeitgeist. Composed of inflatable monuments, intriguing portraits, and dreamlike environments with intricate details, Joann's work has led to collaborations with Gucci, Versace, Nike, Adidas and GCDS.

The surrealist nature of technology is touching creative marketing, with absurdist concepts standing out in a heavily populated social media landscape. Brands like Jacquemus, Isabel Marant and Victoria Beckham have played into VFX campaigns in 2023.

Recently, Hugo Boss unveiled giant holograms of Gisele Bündchen and Lee Min-ho in London, adding a whole new dimension to out-of-home marketing.

Social media quickly seized this new opportunity for creation, fuelling the desire to achieve the impossible. Now, a multitude of possibilities exist to materialise images we could only once imagine. We've seen the Pope in a puffer jacket; the French President protesting in the streets -- visuals generated by CGI and AI have created new realities. However, it's important to note that the generated images often remain stereotyped, as evidenced by the ChatGPT trend 'more', a clichéd representation of the collective imagination.

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73%

Of executives in the luxury industry plan to prioritize AI in 2024.

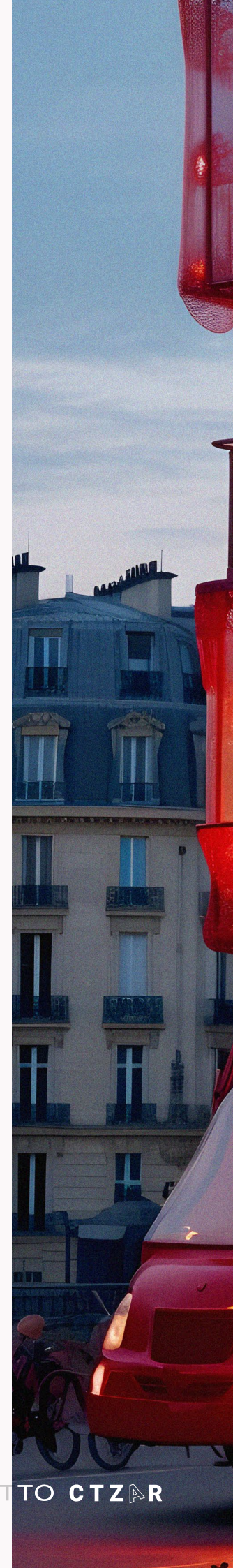
BOF & MCKINSEY, 2023

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57%

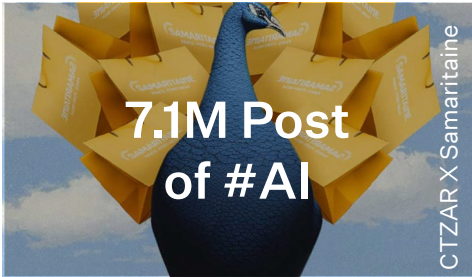
Of Gen Z say they've used generative AI in 2023.

MORNING CONSULT, 2023





# Social Media Trends To Know



## #AI Brands

Beyond consumers, brands were quick to engrain AI in the every day, integrating surrealist visuals into their brand universe, creating a new, mixed reality. Jacquemus has made the most visible use of it on social media, using artificial intelligence to place the brand's products in the most unexpected locations (on a mountain chalet or flying among the buildings of Seoul). Even more engaging on social media, several brands use AI to create educational content. CTZAR created playful content for its client La Samaritaine, one of the largest luxury retailers in Paris, to guess which object was real and which was made by AI. #IsitAI?





### # Expansion Filter

More than just a tool for consumer expression, AI has gained such creative influence that it now also serves as an artistic director. It

started with consumers leveraging AI to add to their existing pictures on TikTok — a way to enrich their narratives. If several of them pointed out the lack of logic and successful transformation, the AI trend quickly became viral, whilst the tool was improving itself with each prompt in the background. Beyond consumers, brands quickly tried to incorporate AI into their creative process.



### #Dreamcore

The metaverse visualised through AI illustrates the desire for escapism. Creators are using AI to create 'DreamScapes', tapping into the 'DreamCore' trend via dreamlike landscapes, animated

to evoke calmness with soothing music and liminal vibes, reflecting our desire for tranquillity and escapism. The paradox? Several creators have gained popularity by illustrating real anxieties. From end of the world journeys into terrifying closed spaces, Instagram artists like The Vvoid (83k followers) or Aleksey (1.2 million follower) bring the collective anxiety of a generation facing its own end to the forefront.

## CASE STUDY:

# Jacquemus Promotes New Bags With Surrealist VFX Campaigns

Data insights powered  
by our partner:

**lefty**

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\$10.7M

EMV Generated by  
surrealist campaigns  
through owned media  
(Instagram+TikTok).

VIA LEFTY

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107M

Impressions, reaching  
23 Posts (IG)  
21 Post (TikTok)

VIA LEFTY

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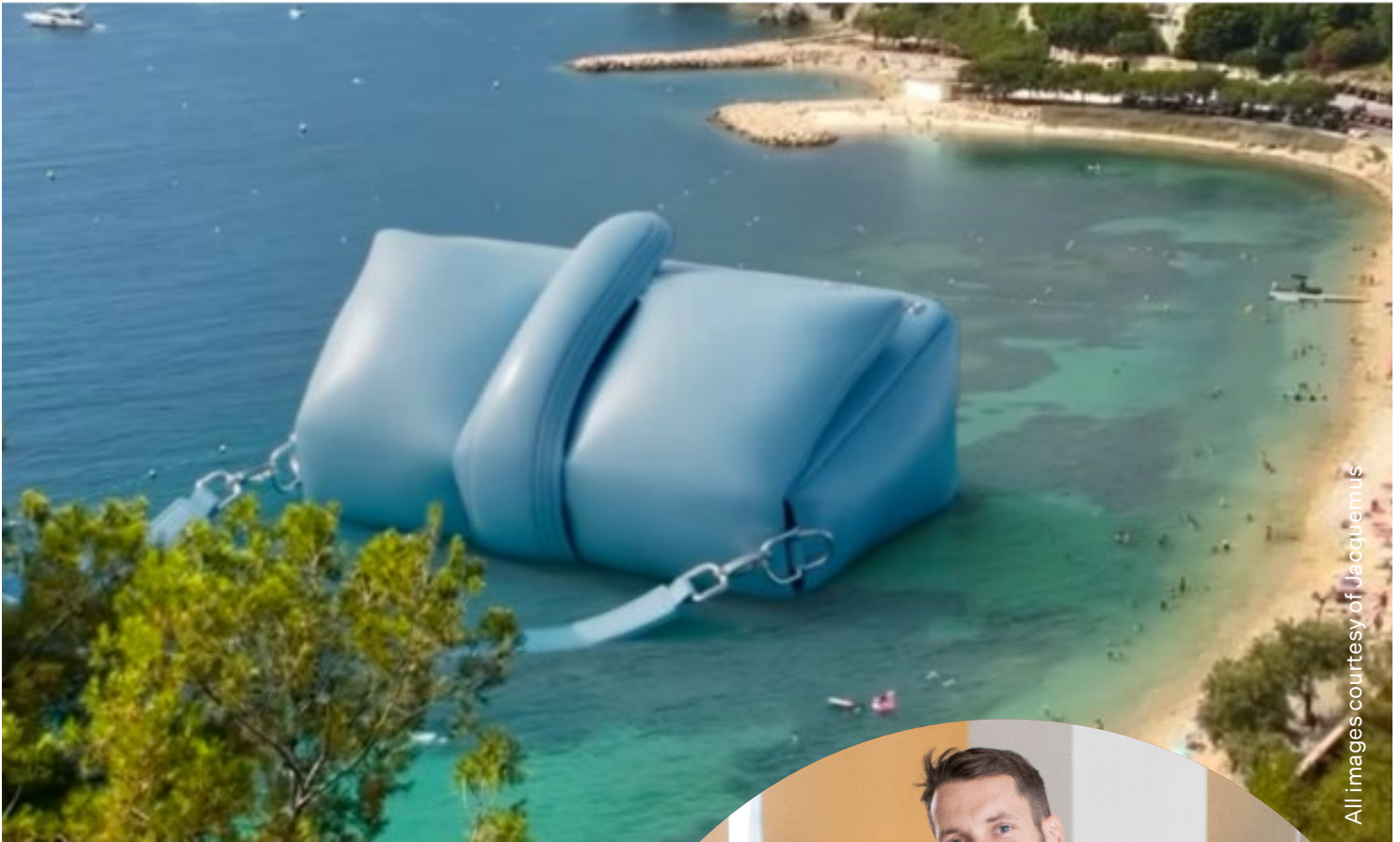
x69%

Jacquemus surrealist  
content is 69% higher  
in engagement rate  
than their other posts  
on Instagram

VIA LEFTY

46





All images courtesy of Jacquemus

While many brands tried to harness the power of VFX technology to create surrealist campaigns, Jacquemus comes out as the clear winner in this space.

Placing some of his most-loved bags like the Bambimou in exaggerated proportions, in iconic holiday destinations, the designer created visually pleasing content that resonated with his audience — more so than any other post on his social media accounts.

According to data powered by our partners at Lefty, Jacquemus is leading the way with significant media value and unprecedented engagement across their surrealist marketing campaigns, showcasing the high level of reception across social media audiences for unusual and out-of-the-box product marketing.



## INTERVIEW

# The Institute of Digital Fashion's Leanne Elliott-Young Talks The Future of Tech

Since its launch in 2020, the Institute of Digital Fashion has become the backbone of innovation in digital fashion, building world-class experiences at cultural moments via AR, CGI, UX, digital try-ons, research papers and SWeb3 consultancy. It was co-founded by Leanne Elliott-Young and Cattytay, who now hold esteemed accolades including: 'Number 1 Women in Web3 Europe', Vogue Business 100 Innovators' and 'Global Top 100 Women of the Future in Emerging Tech.' We asked Leanne about AI, surrealist marketing and which technologies should brands keep on their radar.

**Q:** Many experts are dubbing 2024 as the year of AI. Leanne, do you agree?

**LEY:** Absolutely — we were invited to speak at Davos, the World Economic Forum, and most of the conversations there were on AI, but particularly when it comes to trust issues, as seen with Taylor [Swift]'s deepfakes. Legislation is finally catching up, but for us, the real conversation revolves around digital identity and how AI impacts our perception of self: What does it mean to be a human if AI is interacting like us?

**Q:** In our research, we found Gen Alphas are wary of facial recognition, preferring avatars to create new online personas.

**LEY:** You see this on Roblox, where users explore diverse representations beyond traditional gender norms — we are currently building lots in Roblox.

AI is about having the tools for creative expression. On top of being wary of data collection, how we represent ourselves is going to be a massive trend. Expanding from Lil Miquela, digital avatars and influencers explore what humanity is. This is already evidenced by people showing less curated content that feels human. There's also the interplay between digital and physical; hyper-real and not real as we've seen with the paparazzi aesthetic and the VFX campaigns that are trending now.

**Q:** Speaking of VFX campaigns, we've seen Jacquemus and Isabelle Marant embracing the style in 2023, where do you think this is going?

**LEY:** Spatial computing will revolutionise this space when the technology is fully ready. Some use cases we've seen are phenomenal. In the meantime, VFX and augmented reality are the biggest trends.



The Metaverse failed because fashion is a beast that is obsessed with trends — the technology couldn't follow. When spatial computing hits, you will have that duality of realities even more. VFX campaigns are an introduction to that; you can play with the narrative and storytelling of your brand in new and innovative ways. Fashion is about storytelling, but it also reflects what you feel about, care about and how it feels on the skin. Spatial computing will allow for that. It will reinvent what we all thought was happening in 2020 during the pandemic, but it will be less about removing yourself from reality and actually being in reality. Physical and digital should always work together.

**Q:** How do you see this with regards to sustainability?

**LEY:** There's a new EU government legislation that mandates end-of-life product management and, as a result, that regulates what products can enter the EU. There'll be a massive push for brands to respond.

For us, it's about putting people and the planet first; creating the culture of today for the community of tomorrow. We're now creating blockchain-backed garments, a tracking system for brands to see where their products are and see who's owned them. It's a big push on circularity.

**Q:** Exciting times ahead. How does escapism in fashion intersect with today's socio-political challenges?

**LEY:** Fashion has historically offered escapism during tumultuous times. With the ongoing socio-political crises, brands are doubling down on fantasy to provide consumers a reprieve from reality. However, there's also a call for brands to address pressing issues. Balancing escapism with social consciousness will be key moving forward.

**Q:** We've seen some reluctance from some in the creative community to embrace AI fully. How do we address this?

**LEY:** Many fear that AI will replace human creativity and autonomy. However, I believe AI should be viewed as a tool to augment human creativity, not replace it. By empowering creators with AI-driven solutions, we can unlock new possibilities and push the boundaries of innovation, much like how TikTok's AI-driven algorithms revolutionise content creation.

**Q:** So, it's about harnessing technology to enhance creativity and drive innovation. How do you foresee social media platforms leveraging AI for retail?

**LEY:** Platforms like TikTok are already using AI to curate personalised shopping experiences. With TikTok Shop specifically, AI algorithms analyse user preferences to offer targeted product recommendations, streamlining the shopping process and catering to instant desires. TikTok's algorithm has registered your tastes and desires so it can tell you what you want to have for dinner, give you all the ingredients and also tell you what to wear whilst you're making it. It's created a new speed of decision-making; if you ask anyone how they shop on Tiktok, they do it very quickly. There's no browsing.

**Q:** How has the hype Regarding NFTs in the fashion and beauty industry evolved?

**LEY:** The reason for the big die down is because there was, again, that hype cycle we were talking about. The other factor is the crypto crash — a lot of the NFTs were on blockchains but purchased with crypto.

I think the concept of an NFT is fantastic, something that's on the blockchain, something that's authenticated, with a map of its history. It gives an equity share back to the creator, something which the art world has never been able to do. Also, because fashion is so intrinsically linked to the physical world, something that's just online doesn't hold the same impact. You need that duality.

**Q:** Can you share an example of this duality being done well?

**LEY:** We collaborated with Roksanda, creating a world first, with augmented reality experiences of her design shown at London Fashion Week, paired with NFTs for purchase. Unlike traditional NFT marketplaces, we integrated the NFTs seamlessly into Roksanda's website, preserving the brand narrative and offering an immersive shopping experience. This project aimed to democratise access to digital fashion while pushing the boundaries of creativity and storytelling. Seeing purchasable AR garments on the blockchain at London Fashion Week pushed boundaries.

We also created a 360 experience-driven strategy and sustainable business case for H&M. We knew we needed to engage new audiences, so we created a constellation of touchpoints, weaving the narrative throughout. It started with a CGI campaign in Times Square, with Kristen McMenamy and Vittoria Ceretti wearing digital fashion of the highest standards. We put digital fashion centre-stage, using motion capture, VFX, CGI, which were all also shown in the stores, with holograms in the windows, alongside augmented reality try-ons.

**Q:** Thank you Leanne for such an inspiring conversation!

“With the ongoing socio-political crises, brands are doubling down on fantasy to provide consumers a reprieve from reality.”

Leanne Elliott-Young, Institute of Digital Fashion



KEY STRATEGY #6

# Cute Culture

An increasing number of people are finding their escape through 'cute', immersing themselves in alternative soothing worlds for the mind. This includes video games, toys and fashion that offer an alternative to the 'usual'. 2024 will see this concept evolve with the famous Hello Kitty character celebrating its 50th anniversary.

While cuteness can evoke happy emotions on a surface level, Claire Catterall, senior curator of Somerset House's 2024 exhibition 'Cute', notes: 'its playful ambiguity also helps us to navigate an increasingly overwhelming and complicated 'now', providing a way to live [fearlessly] in uncertain times.' Cuteness is an equally alluring and intriguingly dark part of modern popular culture that has the power to create an emotional connection with consumers. The exhibition explores darker aspects of 'Cute' such as 'Sugar-Coating' whereby political ideologies and industrial corporations use cute as a tool of manipulation.

## CONSUMING CUTE

There is also a connection between cuteness and consumption, as seen in Japanese culture and Kawaii products. These are driven by a consumer's desire to cope with stress and reconnect with their childhood self, further evidenced by the rise in popularity

of #Kidulthood — the hashtag 'cartoon style' (#元气卡通风) now has over 45 million views on Chinese social media platform Xiaohongshu.

Western brands have started to tap into this culture to appeal to a diverse audience. In November 2023, Our Legacy launched a collaboration with Emporio Armani, which they promoted via an anime-style campaign, accumulating over 21k engagement on Instagram.



Hello Kitty features in the latest GCDS show (via Spotlight)

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# 90%

Of Japanese consumers have the feeling of Kawaii and 70% of them feel it as frequently as once a week. Those who feel Kawaii tend to be happier.

PWC JAPAN X SANRIO, 2021

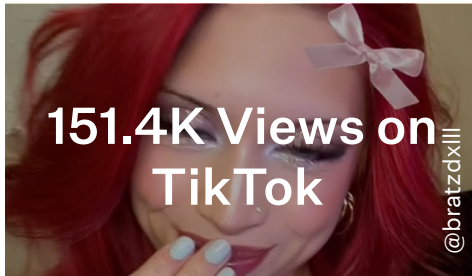
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# \$105B - \$84.5B

Pokemon and Hello Kitty made the most earnings globally, as media franchises, nearly 70-80% more than successful movie franchises such as Harry Potter (32.2B) or Spider Man (27.9B).

STATISTA, 2021

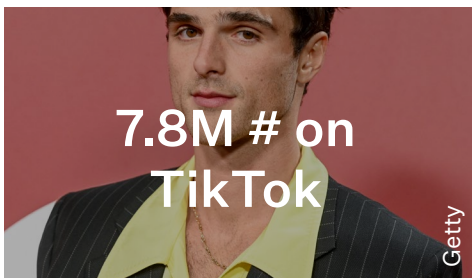
# Social Media Trends To Know



## #Imjustagirl

Gen Z women are creating their own language. Through the trend 'I'm just a girl', using the No Doubt song of the same name,

they highlight on TikTok what defines them as women or as young girls. This trend, coupled with hashtags such as #girlmath (where they justify purchase behaviours via amusing and often illogical equations), are used satirically and ironically, highlighting their gender as a means for either avoiding tasks, responsibilities or being inadequate to perform certain chores.



## #babygirl

The internet has coined a fresh term to define a new era of

masculinity: 'Babygirl Men.' The #babygirl trend is defined by stars such as Jacob Elordi, Pedro Pascal, Harry Styles and Bryan Cranston, who have a stereotypically more 'flamboyant' style of dressing which plays on 'cute' coding, while while embodying a 'bad boy' persona.



Graphic Thought Facility (1990, UK). Playing dress-up with AI, 2023, courtesy of Somerset House



### #MiniCooking

Beyond creative pop culture interpretations, cute also generates amusing translations on social media. One of them promotes the idea of a miniature world; several accounts have built their popularity around this concept, such as Yummy Bakery (1.9 million followers) or MyMiniatureLife (7 million followers). Within this trend, the idea is to shrink objects and make even the most mundane actions of daily life or human emotions cute. This is also evidenced through animated animal characters such as Brainier990.

# CASE STUDY: SKIMS Embraces the Coquette Trend with Lana Del Rey



Lana Del Rey For Skims, Valentine's Collection.

Featuring bows, blush pink satin, cats and glamour icon Lana Del Rey, SKIMS' latest Valentine's Shop campaign banked on the coquette trend to drive impact.

With an aesthetic that has been embraced by the singer previously, the campaign resonated with her audience, driving higher engagement rate than on her other posts. This resulted in high EMV and impressions for the brand.

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10.3M

EMV Generated by SKIMS  
Lana Del Ray campaign

Via LEFTY, 2024

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33.84%

ER Generated by campaign  
- 144% higher than SKIMS  
average

Via LEFTY, 2024



‘[The] playful ambiguity [of  
Cute] helps us to navigate an  
increasingly overwhelming  
and complicated ‘now’,  
providing away to live  
[fearlessly] in uncertain  
times.’

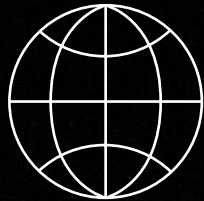
CLAIRE CATTARAL,  
EXHIBITION CURATOR, CUTE  
SOMERSET HOUSE, 2024



# *Insights by* **KARLA OTTO**

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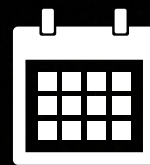
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# KARLA OTTO

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