

A close-up, low-angle shot of a sparkler exploding in the center of the frame. The sparks are bright orange and yellow, radiating outwards in all directions. The background is dark, with some blurred light sources and other sparklers visible in the distance, creating a festive, celebratory atmosphere.

OmnicomPRGroup

**SOCIAL & DIGITAL
COMMUNICATION
TRENDS 2023**
A PERSPECTIVE ON
EUROPE

December 2022



FOREWORD: AS BUDGETS TIGHTEN, **PLATFORMS CONTINUE TO INNOVATE IN 2023**

Let's not pretend all is well in the tech world. Facebook announced it was losing users for the first time in its history, before it laid off 11,000 workers. Twitter was losing \$4m a day before Elon Musk swooped in to lay off half his staff and change policies overnight – and lost a further 1m users. And now US Government bodies are expressing concern about TikTok data security, with some advocating a ban. Amazon too recently announced it was laying off 10,000 employees.

Europe is heading into a recession, brought about by Putin's invasion of Ukraine. But while advertising spend may be marginally down year-on-year at Meta, at Alphabet (Google, YouTube) ad spend is up and overall Digital Ad spend is up 5% year on year. Digital spend will make up 60% of global ad spend in 2023. While other media struggle, the tech industry is still healthy and continues to innovate.

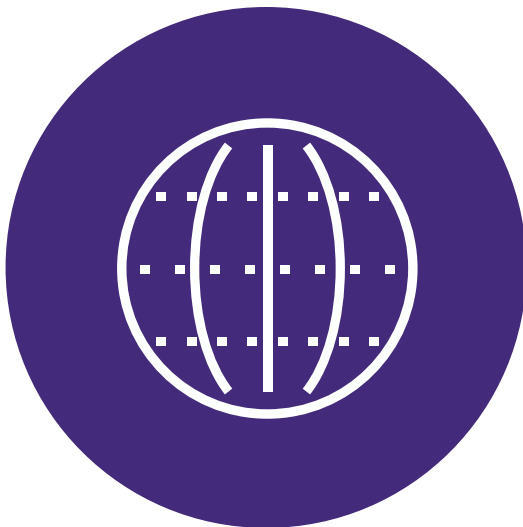
But, while we must be mindful of data privacy issues and GDPR, we must also remember that the digital world still holds the most comprehensive audience data. It's the digital world that allows communications professionals to target their audiences more accurately and report on that too. Without waste. Anyone who has spent time and money investing in paid targeting online will know the accuracy of these campaign planning platforms. And anyone who has built up an earned audience on given platform will marvel at the detail of their reports, including who is seeing what, where and for how long.

So it's hardly surprising then that the biggest 2023 trends are about innovation, as tech platforms continue to find creative ways to keep their audiences engaged and online. And if they manage this, we'll have the data to prove it!

Enjoy

Your EMEA Digital Communications team

SOCIAL & DIGITAL MEDIA USAGE IN EUROPE



Number of Internet users in Europe:

743.6 million¹



Share of active social media users in Europe:

- #1 Spain (87.1%)
- #2 Germany (86.5%)
- #3 Switzerland (86.2%)²



Highest social media advertising revenue in Europe:

United Kingdom
12.16 billion US\$³



Social media usage by platform type in Europe:

- #1 Messengers (74,8%)
- #2 Social networks (68,6%)
- #3 Media sharing (62%)⁴



Leading social media platforms by share of website visits in Europe:

- #1 Facebook (80.5%)
- #2 Instagram (6.53%)
- #3 Twitter (5.6%)⁵

1. Internet World Stats (December 2021): <https://bit.ly/2CEWi66>
2. We Are Social; Hootsuite; DataReportal (January 2022): <https://bit.ly/3DI0K5R>
3. Statista; Statista Digital Market Outlook (2022): <https://bit.ly/3DzzITw>
4. Statista; Social media usage in Western Europe (2022): <https://bit.ly/3E3CR8R>
5. StatCounter (October 2022): <https://bit.ly/3NBED5w>

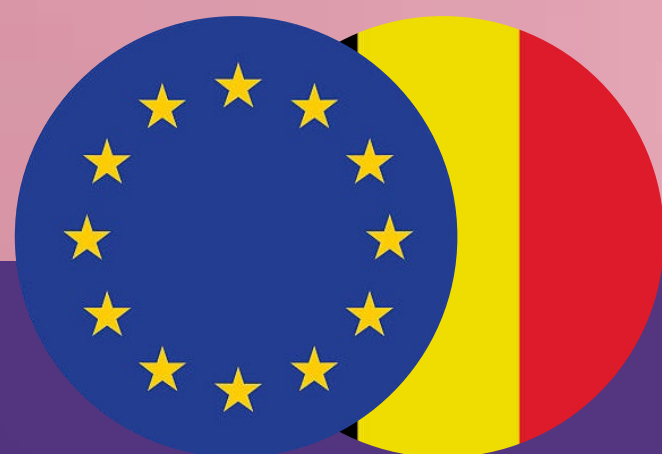
FACTORS THAT WILL HAVE AN EFFECT ON SOCIAL MEDIA USE & CONTENT



KEY TRENDS FOR SOCIAL & DIGITAL COMMUNICATION IN EUROPE 2023

Summarized by the Social & Digital leaders from the Omnicom PR Group network across Europe, this report consists of 8 social media & digital trends for the next year and how they can be used by brands:

- 1** The quest for digital truth
- 2** Social media become a search engine
- 3** From influencers to podcasters
- 4** A game-changing approach to social media participation
- 5** Influencer marketing: clearer framework, greater impact
- 6** Avoid communications waste
- 7** Generative AI in content creation
- 8** Digital sustainability challenge



THE QUEST FOR DIGITAL TRUTH





THE WORLD IS BECOMING **INCREASINGLY DIVIDED**

Social media brought us together but now it's driving us apart. Algorithms feed confirmation bias, rogue states control access to counter narratives, and the rise of disinformation breeds distrust. Amid conflict and crisis, 2023 will be about access to truth ...

➤ **Misinformation worries business**

In a recent FleishmanHillard global survey, three in four business leaders said misinformation was a threat to business success. Everyone's a publisher and it doesn't take much effort to destroy a business's reputation.

➤ **Social channels and fakery**

Elon Musk's arrival at Twitter raised a very important question: how many accounts are actually real? Twitter is a vehicle that can drive a stock crash or determine a democratic election. But will one man's quest for truth come at the cost of another's social justice?

➤ **Autocratic states control access to news and information**

A recent BBC report investigated the effect of Putin's controls on web sites in Russia. It found devastating results on Russian searches in Russia... with Yandex and Google searches around key news events revealing only a Kremlin-controlled narrative

➤ **The rise of deep fakes**

In a system that feeds confirmation bias, it is easy to see how mistruths can click their way to popularity. But misinformation is now being side-lined by disinformation – deliberate fakes and lies produced by parties who set out to do harm.



HOW CAN YOUR COMPANY **USE THIS TREND?**



PAY CLOSE ATTENTION TO YOUR BRAND ONLINE

Listen to what's being said about your brand and products online, in the media, social media and in search. All the time.



GET OUT AHEAD

Pre-empt an attack on your values and your people by proactively speaking about what you stand for. Create trustworthy spokespeople now.



LET NOTHING GO

Small mistruths can be tomorrow's crisis. Defend your brand and products against common false allegations online and optimize for the search bots, or pay to beat the queue.

WHAT OUR EXPERTS SAY ...



PETER WILSON,
HEAD OF DIGITAL REPUTATION

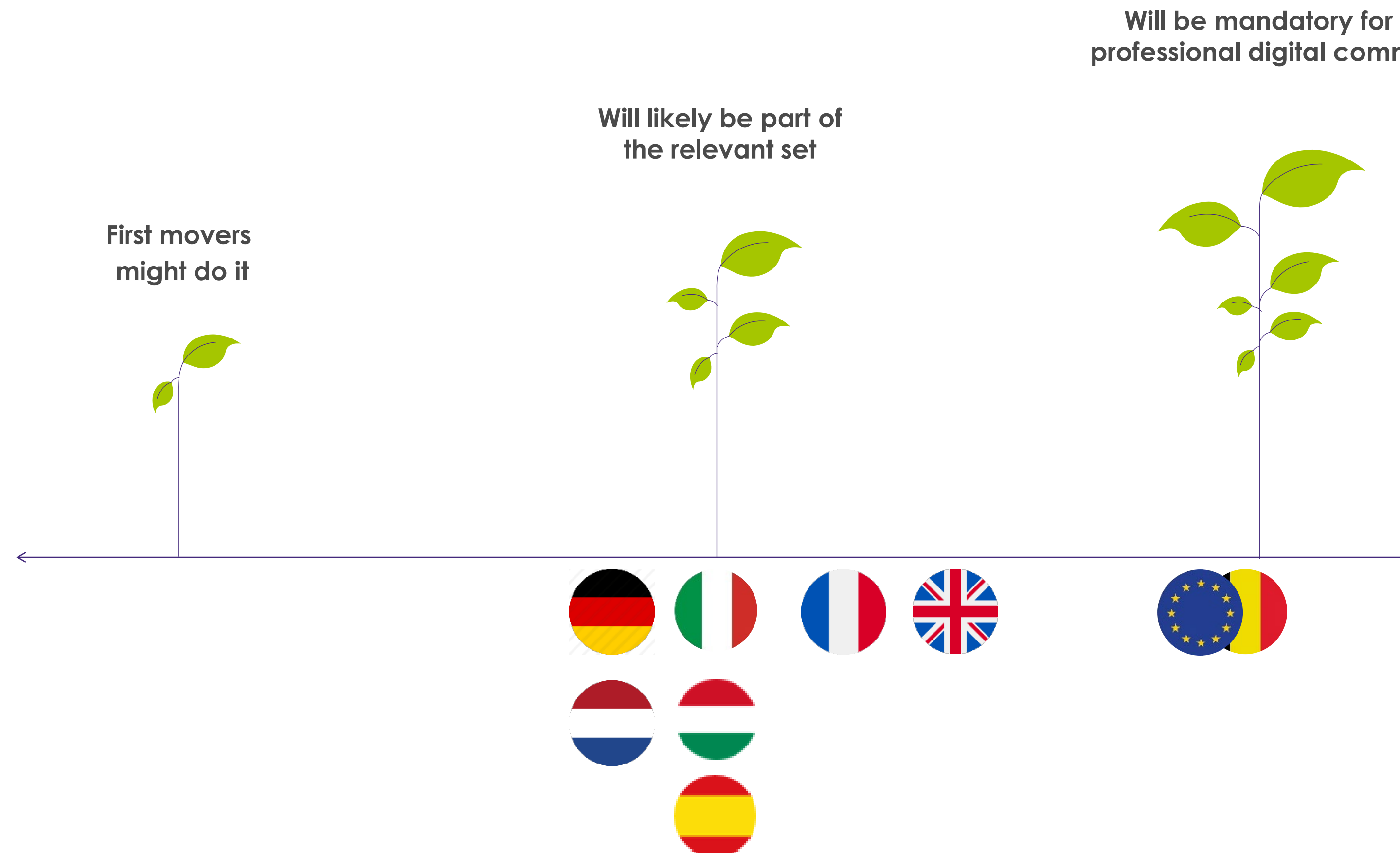
"Don't wait for somebody to misrepresent you, your business or your product. Own your story: publish your perspective and your values in your own channels now so that you have evidence of responsible behaviour and trustworthy people."

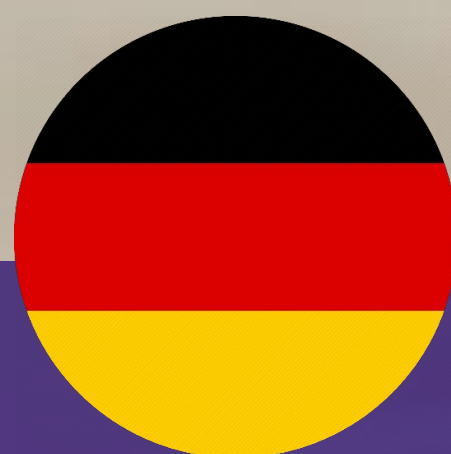


GABOR FADGYAS,
VP FOR STRATEGY

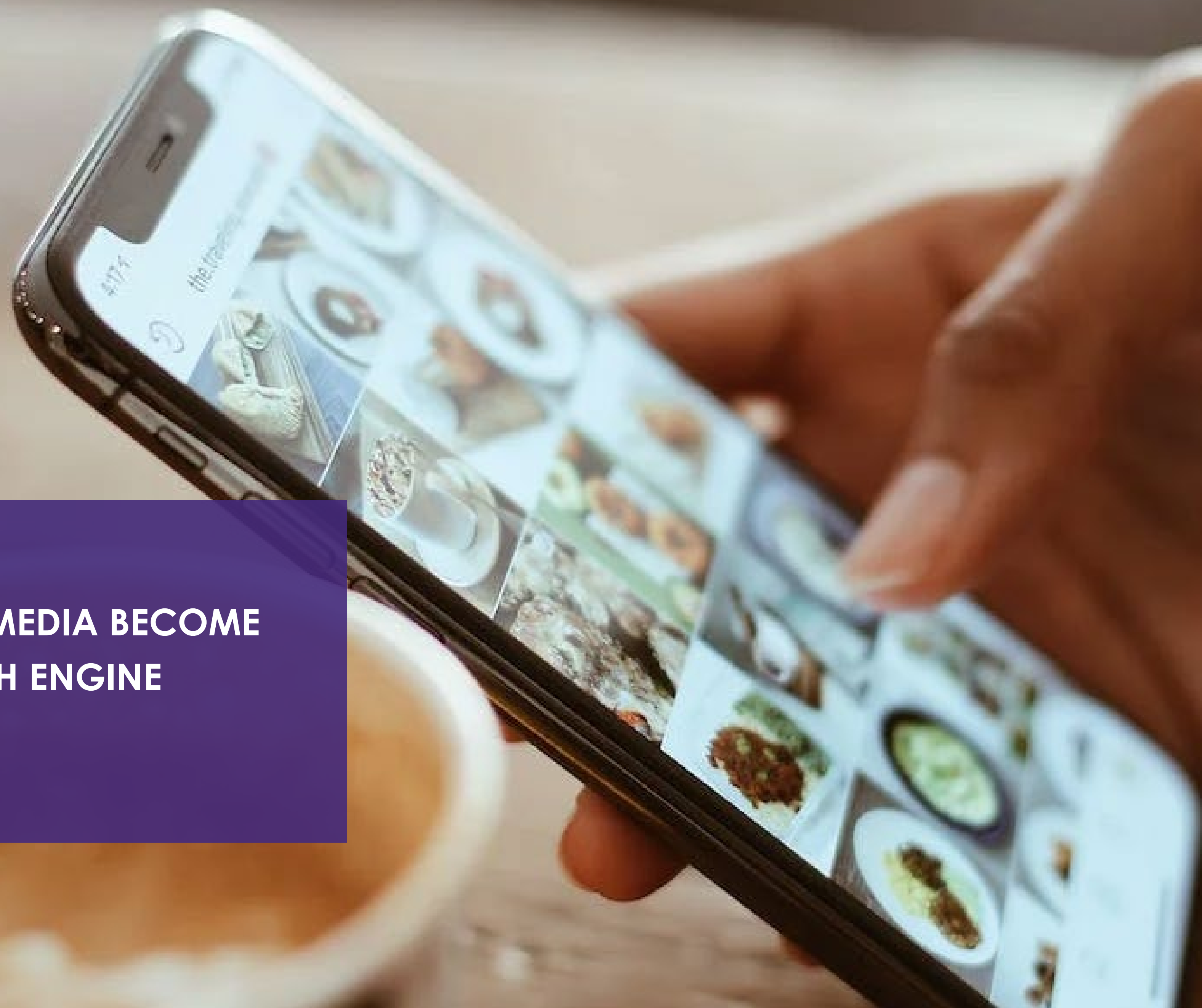
"Preparedness of your communication people and the wider management team is key to the timely identification of and efficient action against threats that can hamper your hard earned reputation. Have a clear definition for different levels of threats so you do not jump on shadows. Hold regular crisis trainings so you all know what to do when something really hits the fan."

HOW CONCERNING IS THIS TREND IN YOUR MARKET?





**SOCIAL MEDIA BECOME
A SEARCH ENGINE**



MORE PEOPLE THAN EVER SKIP GOOGLE AND **SEARCH IN SOCIAL**

Take what you know about search engine optimisation and turn your attention to YouTube, Instagram and TikTok – many users search there

➤ **TikTok Search for the win**

According to Google, 40% of “young people” go straight to TikTok or Instagram now for “google-able” answers – like finding a place to lunch or learning a new skill.¹ But there is still a lot of misinformation on TikTok.

➤ **Relevance meets entertainment**

Based on how these social networks operate, the offered knowledge needs be extremely relevant from the get-go & entertaining: Being funny while fulfilling a need is the new normal. There is a real niche for brands.

➤ **Algorithm is King**

Content that is favoured by the algorithm (SEO) performs better – that includes strategic use of hashtags, trending sounds and features as well as fostering lots of engagement via comment management.

➤ **Video is Queen**

As the platforms users gravitate towards are highly video-focused. Publishers will need to up their game, producing short- and long-form videos. Where some brands did not need this so far, this will likely change rapidly.

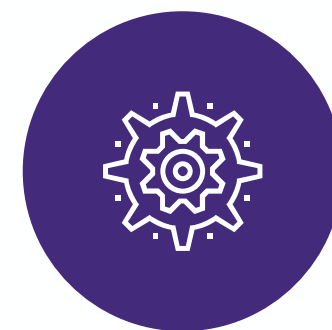


HOW CAN YOUR COMPANY **USE THIS TREND?**



INCREASE KNOWLEDGE

Now is the time to understand the channels, your audience on them and build your social-video capabilities. There is room for thought and market leaders.



MAKE VIDEO A PRIORITY

If you haven't tried to include social-video in your comms-mix, you should start in 2023. Choose from reels on Instagram or long-form content on YouTube.



INVOLVE YOUR AUDIENCE

If you are not sure what your audience is looking for, invest in a SEO analysis to find topics or use polls or market research to ask them directly for more efficiency.

WHAT OUR EXPERTS SAY ...



STEFANIE SÖHNCHEN,
VP DIGITAL STRATEGY

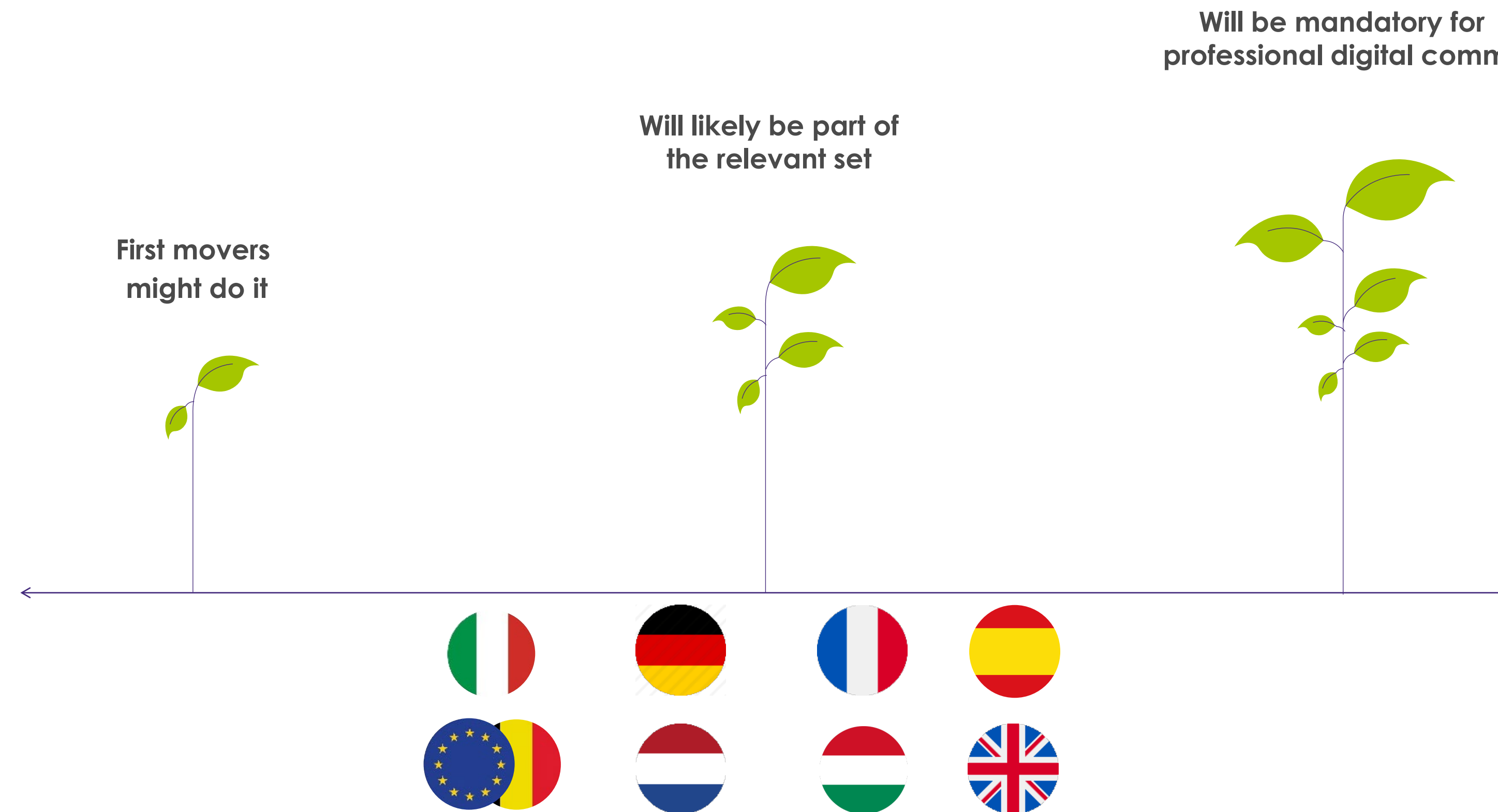
"This could change content consumption completely. If brands haven't invested in SEO- or video-capabilities, yet, they may lose a significant amount of traffic with younger audiences due to this trend."



ANNE-LAURE BARIERAUD,
HEAD OF DIGITAL

"Social networks can be good allies to diversify the sources of information of a brand. They will also allow you to increase the number of links that point to your website. The more your links are shared, the more they will potentially generate clicks. "

HOW CONCERNING IS THIS TREND IN YOUR MARKET?





FROM INFLUENCERS TO PODCASTERS



WHEN INFLUENCERS BECOME PODCASTERS AND VICE VERSA

Do you feel like almost everybody owns a podcast? Now influencers are mastering this trend by getting closer than ever to their audiences

➤ **Loving podcasts. Loving radio**

According to the latest EGM, 22m Spanish people listen the radio every day. This is key, as loving radio and its closeness is one of the main reasons why podcasts are becoming so popular. Some are also being recorded live.

➤ **New old formats**

While influencers keep “fighting” Instagram’s algorithm and how to be viral on TikTok, some are finding in podcasts the freedom they had in blogs and miss in other platforms. Podcasts allow them to express and show themselves naturally.

➤ **Name a topic and create a podcast**

Feminism, Millennial Nostalgia, History, Politics... Influencers have noticed podcast variety is huge and they can find their place while using their social media to reach bigger audiences.

➤ **Video is still the Queen**

As the platforms are now highly video focused, some influencer podcasts are also recorded on video. This allows their audience to binge-watch podcasts on Youtube, Spotify and even HBO. Video teasers are also key for sharing new episodes.

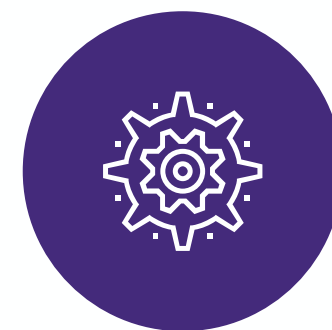


HOW CAN YOUR COMPANY **USE THIS TREND?**



CHECK THE CHARTS AND LISTEN

If podcasts charts are filled with influencer podcasts, keep informed and listen. The best way of finding the perfect fit within a popular podcast is getting to know it.



MAKE YOUR OWN

If you haven't found the perfect fit for your brand or you have found a great but little project, sponsor it. Influencers and media may be open to co-create.



KEEP THE ESSENCE

If podcasts become a safe space for the audience, brands and their mentions should be 100% integrated in their usual language to be effective.

WHAT OUR EXPERTS SAY ...



MÓNICA LEÓN,
DIGITAL DIRECTOR

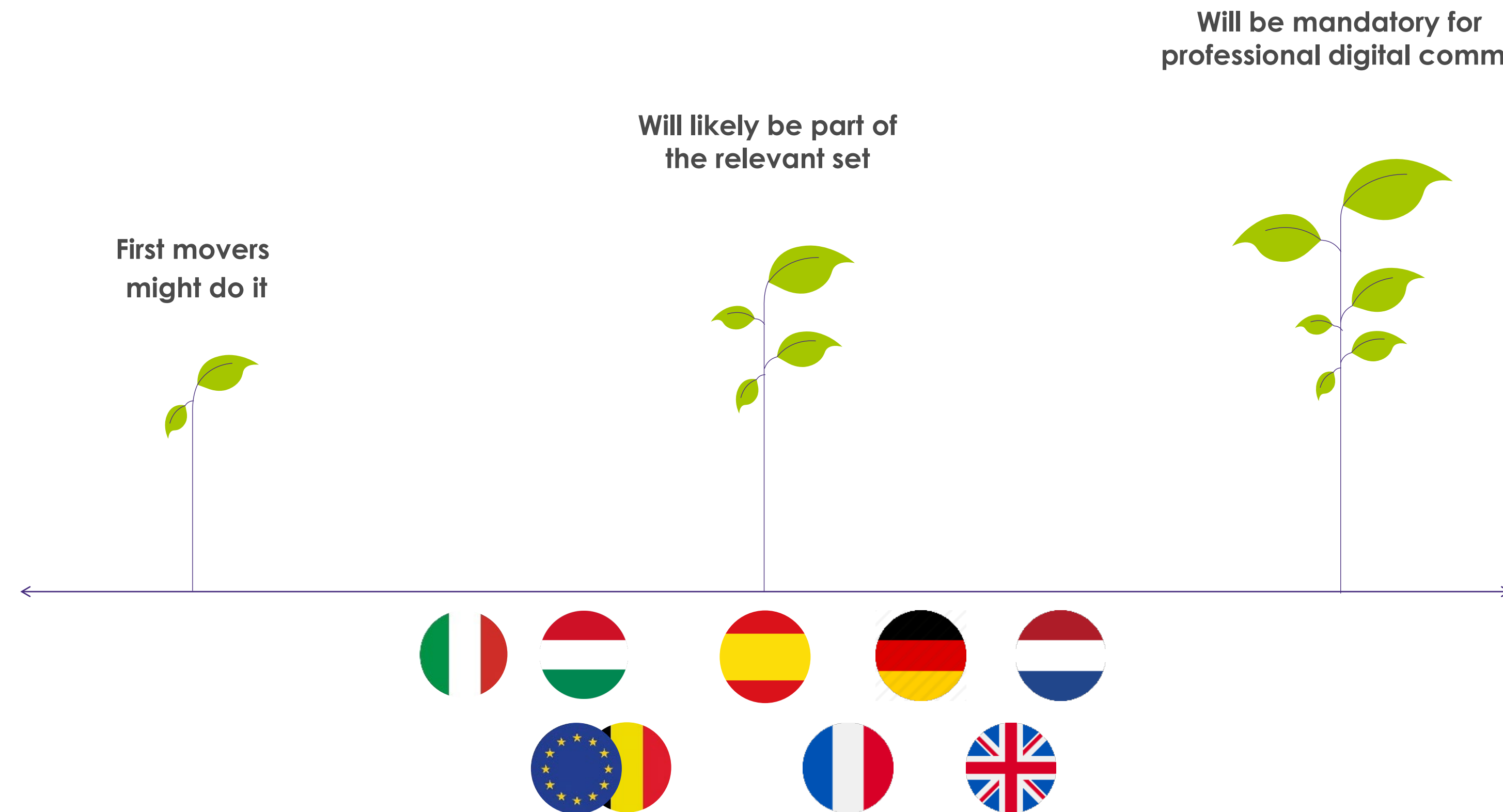
"Even if podcast audiences may seem little compared to other digital channels, the closeness and community they create may be perfect for introducing brand messages. If we add influencers to this mix, their huge potential should be considered in communication plans"



CHÉLINE RUHOF-DE VRIES,
HEAD OF SOCIAL, DIGITAL & INNOVATION

"Influencers are becoming entrepreneurs (and vice versa) with their own platforms. Brands must think about what they can offer to leverage the power of these communities: what news, content, product, or experience will reinforce their relationship? How can our brand deepen their connection?"

HOW CONCERNING IS THIS TREND IN YOUR MARKET?





**A GAME-CHANGING
APPROACH TO SOCIAL
MEDIA PARTICIPATION**



A GAME-CHANGING APPROACH TO **SOCIAL MEDIA PARTICIPATION**

With the societal challenges continuing in 2023, being authentic and showing your human side as a (employer) brand or leader is key to staying relevant and in touch with your audiences. This is underlined by the rise of BeReal.

➤ **Stepping away from the commercial content overload**

After years of finding ways to deal with the 'commercial content overload' on social media, users and new platforms are taking clear action. In 2023 we expect to see the game-changing approach to participation of BeReal being adopted by more platforms and users.

➤ **The BeReal approach to participation**

BeReal stimulates users to be active only once a day, at a different time each day, sharing a true snapshot of what they're doing within 2 minutes by using the front and back camera. This approach unifies the longing for more authentic content of your relations and a solution for the struggle of being online constantly to discover 'what's new'.

➤ **More human and authentic content**

The approach helps users to centralise their engagement around one time a day only. And it helps mental health even more, as users feel less worried about the 'perfect picture' and experience less #FOMO when they see their friends are also just laying on the couch.

➤ **Adoption by other channels**

The new social media app has already been adopted by 30% of the teenagers in the Netherlands, has gone viral via TikTok and Instagram has started to develop a copy, called IG Candid. A name that hints towards what the BeReal approach also offers: candid camera fun. After all, we all hope to find entertainment when opening our social media apps.



HOW CAN YOUR COMPANY **USE THIS TREND?**



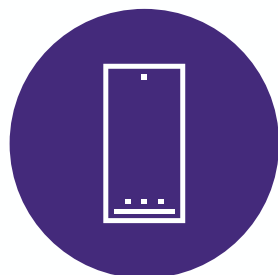
CREATE AUTHENTIC AND HUMAN-CENTRIC CONTENT

Whether it's on Instagram or LinkedIn, pushing brand or commercial messages won't engage your audience. Be real by connecting with what keeps your audience awake at night and dare to take a stance. People want to connect with people, so consider putting more effort into showing the face behind the brand and executive profiling.



PARTNER UP WITH CREATORS TO MAKE YOUR BRAND PART OF BEREAL

Similarly to TikTok, BeReal users are not receptive of advertisers. Leverage the power and the community of creators / influencers to find a place for your brand in this new social media app.



BE ON TREND BY USING THE BEREAL FORMAT

As BeReals are being posted on other platforms as well, try using it in an Instagram post and be playful and creative with the BeReal front and back camera format to entertain your audience (and show you're on top of trends).



KEEP AN EYE OUT ON BEREAL INSPIRED FEATURES ON OTHER PLATFORMS

Successful social media formats are quickly getting adopted by other channels. Keep an eye on the established platforms and their new BeReal-inspired features to leverage.

WHAT OUR EXPERTS SAY ...



CHÉLINE RUHOF-DE VRIES,
HEAD OF SOCIAL, DIGITAL & INNOVATION

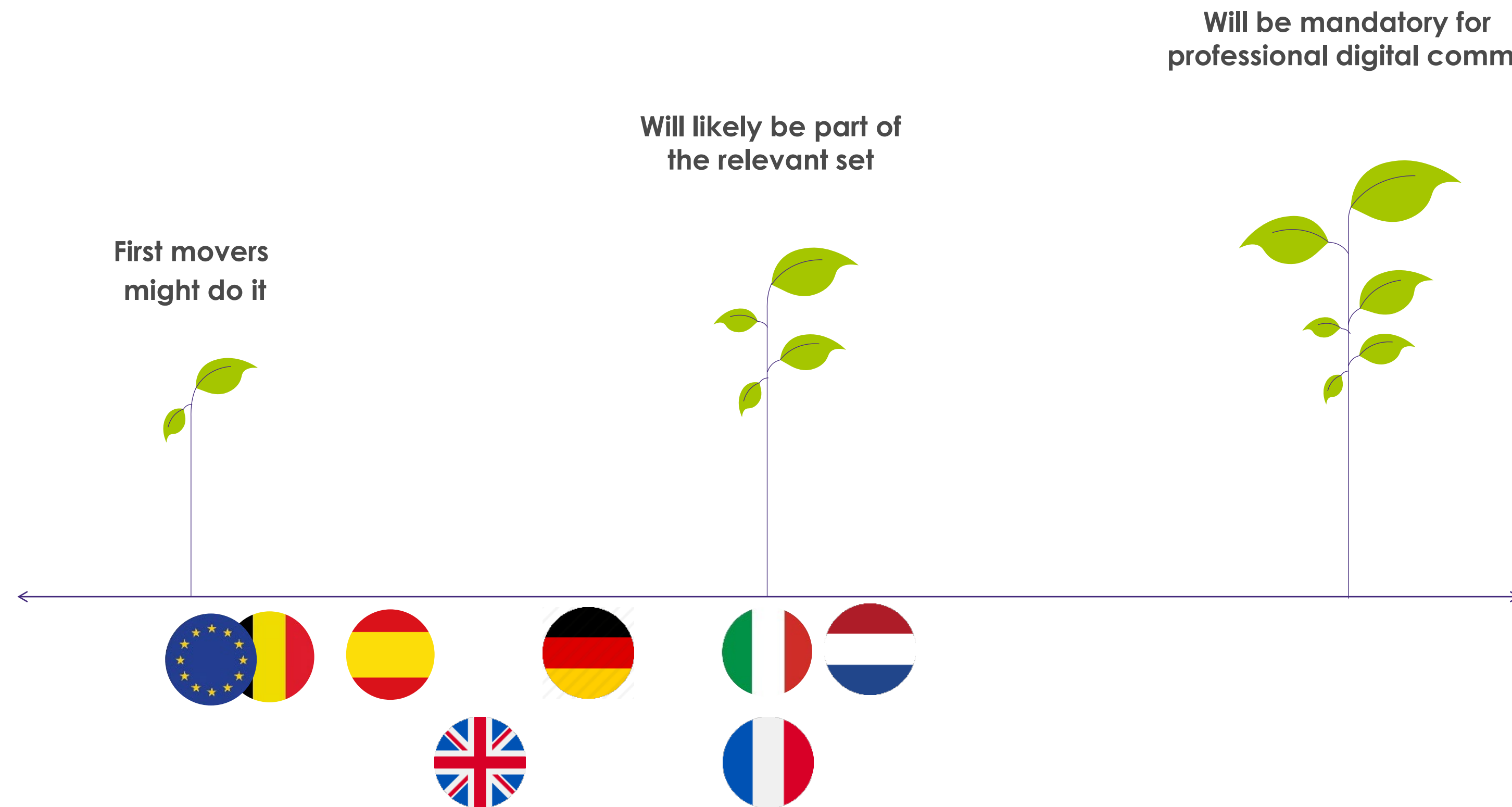
"Being more real on social media is essential for brands and leaders to keep the attention and interest of their audience. Specifically for brands that target Gen Z, the early adopters of BeReal, leveraging the new app might give them an advantage."

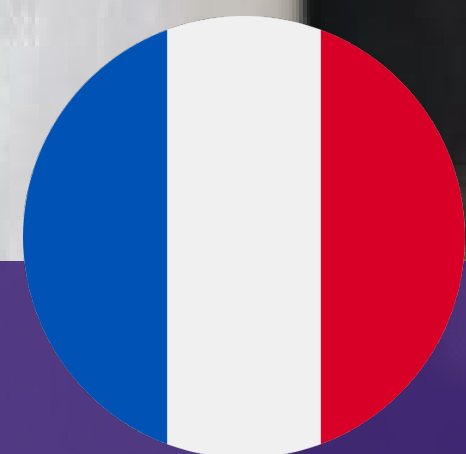


STEFANO ASSI,
VP HEAD OF STRATEGY

"We have to remember the importance of direct and personal contact. People appreciate personal attention. They want to be recognized as individuals with specific needs and preferences."

HOW CONCERNING IS THIS TREND IN YOUR MARKET?





**INFLUENCER MARKETING:
CLEARER FRAMEWORK,
GREATER IMPACT**



INFLUENCE MARKETING, FROM **COMMITMENT** TO **REGULATION**

Social, societal and environmental commitment is now considered a prerequisite for brands and companies engaging with consumers. In 2023, we face a new challenge – (re)building credibility and ensuring the right impact through influencer marketing campaigns.

➤ **Influencer equity & content**

Influencers have built their editorial lines as individual brands, and only collaborate with brands they are aligned with. Influencers no longer hesitate to put quality ahead of quantity in order to avoid backlash.

➤ **Rise of "expert" influencers**

We are seeing a rise in power of influencers who are experts in their subjects, especially micro-influencers, as their audience is more engaged than macro-influencers.

➤ **Data & Measurement**

Brands are working more and more on affinity, with data becoming an essential measurement tool to understand the behavior of an audience, qualify it in a relevant way, taking advantage of the perfect complementarity of earned and paid.

➤ **Transparency & Regulation**

This ecosystem, which is becoming more professional, is requiring more transparency in influencer marketing, the only way to preserve influencers' trust capital. A law proposal is currently being debated in France.



HOW CAN YOUR COMPANY **USE THIS TREND?**



CREATE BESPOKEN CAMPAIGNS

Co-created work with influencers will always have more positive impact on an audience than a copy-paste! The initial message will be highlighted with the authentic 'touch' of the influencer and will generate trust.



BE TRANSPARENT

Working with PR agencies that frame influencer marketing practices and reinforce the commitment to transparency. The PR agency thus undertakes to distinguish influencer engagement fees from other campaign expenses.



BE COMMUNITY ORIENTED

Focusing on a deeper understanding of your consumer ecosystems allow to understand exactly who is sharing discussions around your brand.

WHAT OUR EXPERTS SAY ...



ANNE-LAURE BARRIERAUD,
HEAD OF DIGITAL

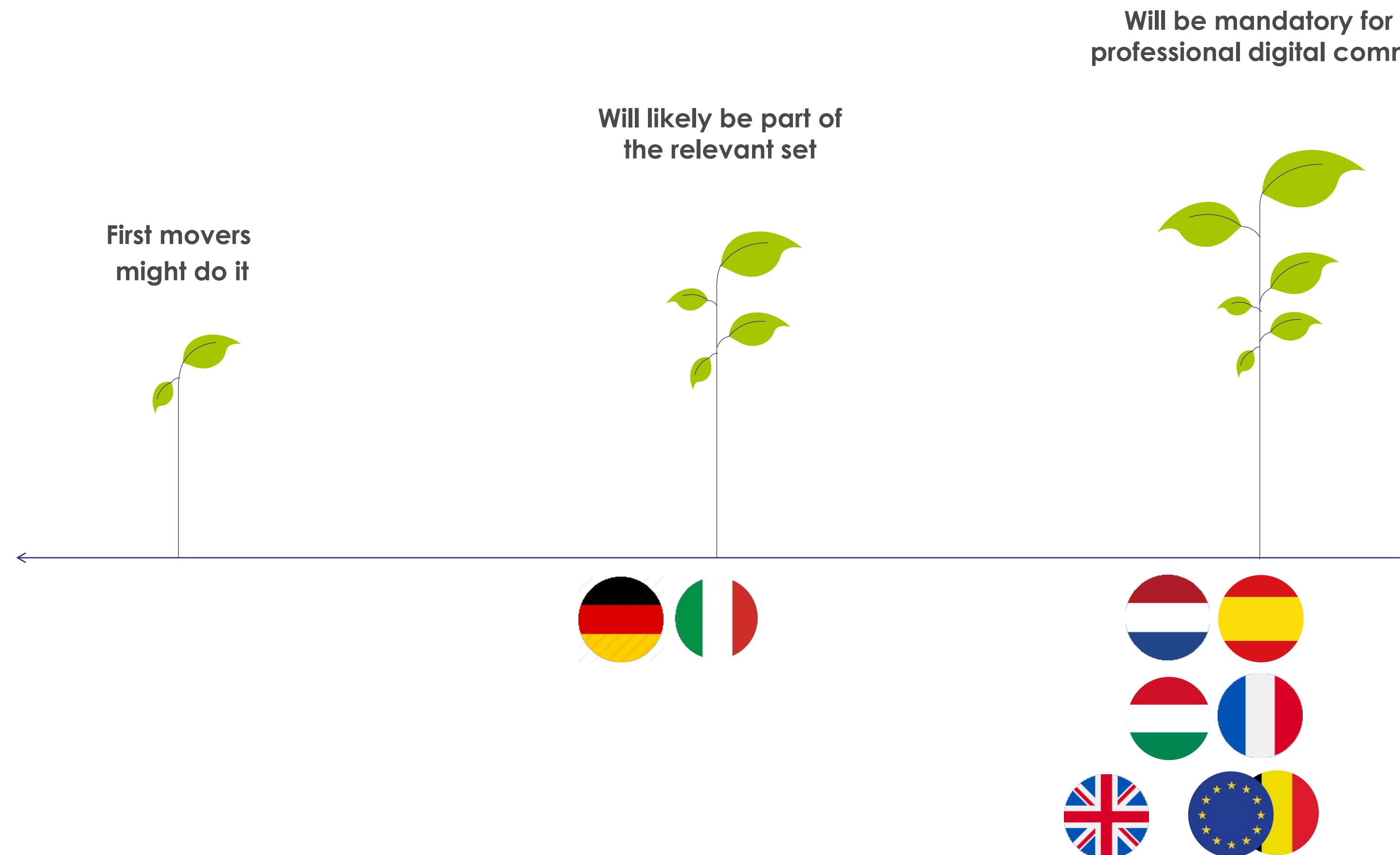
“Creativity appears to be an essential lever for impact in 2023. It seems interesting to encourage brands to give a maximum of creative freedom to influencers, particularly in the case of Chinese platform TikTok. In the meantime, transparency is the only way to preserve trust in influencers.”



MÓNICA LEÓN,
DIGITAL DIRECTOR

“As working with content creators is becoming common in most communication campaigns, both creativity and credibility need to be enhanced and preserved. Encouraging creators' freedom to express themselves naturally is key for a campaign's effectiveness. Regulation is getting stricter in Europe to ensure audiences are aware of paid partnerships. Brands should be aware of the latest regulations.”

HOW CONCERNING IS THIS TREND IN YOUR MARKET?





AVOIDING
COMMUNICATION
WASTE WILL BE KEY



IN 2023 IS ABOUT SPENDING **SMART ON SOCIAL**

Predictably in times of economic discomfort, marketing and comms budgets can feel squeezed and there's a shift to spending smarter. Social media channels are very effective in this regard, ensuring that you're engaging and harnessing only relevant social media users.

➤ **Social ads need to be socially relevant and value-aligned**

To resonate, engage and create behaviour change with your relevant audiences, investing in social ad spend where you can be super targeted will be key to investing efficiently in 2023.

➤ **Social media proof / storytelling**

To get the best value, it is sometimes worth playing the longer game. Whatever message you're trying to convey, it is worth investing in the 'social proof', to portray a clear and authentic picture.

➤ **Keep content coming**

To be more efficient with your social media spend, content shouldn't be cut back. Instead 'sweating' content and applying a 360 to comms will be key. Then testing and learning that content will be key to driving forward your audiences and then investing more in the best performing content pieces.

➤ **Power to the people**

Whatever subject matter you are driving forwards towards your target social media users, it is worth considering the human angle, aligning this content with the targeting and your paid spend investments will be key.

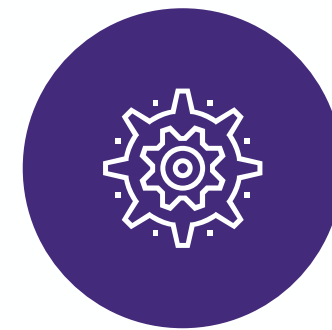


HOW CAN YOUR COMPANY **USE THIS TREND?**



AUDIENCE ANALYSIS

Analyse your current audiences and get insights now ahead of 2023, where do you need to spend and invest to meet your objectives. You might be surprised that your organic followers don't match the audiences you need to reach, so make them a focus with your paid investment



OPTIMISATION PLAN

To be efficient with paid spend in 2023, ensure that your strategy is over-arching but you are willing to agree to quick changes. Have a clear optimization cadence set-up to get the best out of your investments.



CONTENT FIRST

Ensure that wider teams are tee-ed up with your social media plans and ambitions and are plugged in so you're being fed good amounts of content to refine and to be able to test with your audiences.

WHAT OUR EXPERTS SAY ...



MATT ROWE,
HEAD OF DIGITAL, SOCIAL, MEDIA AND PLATFORMS

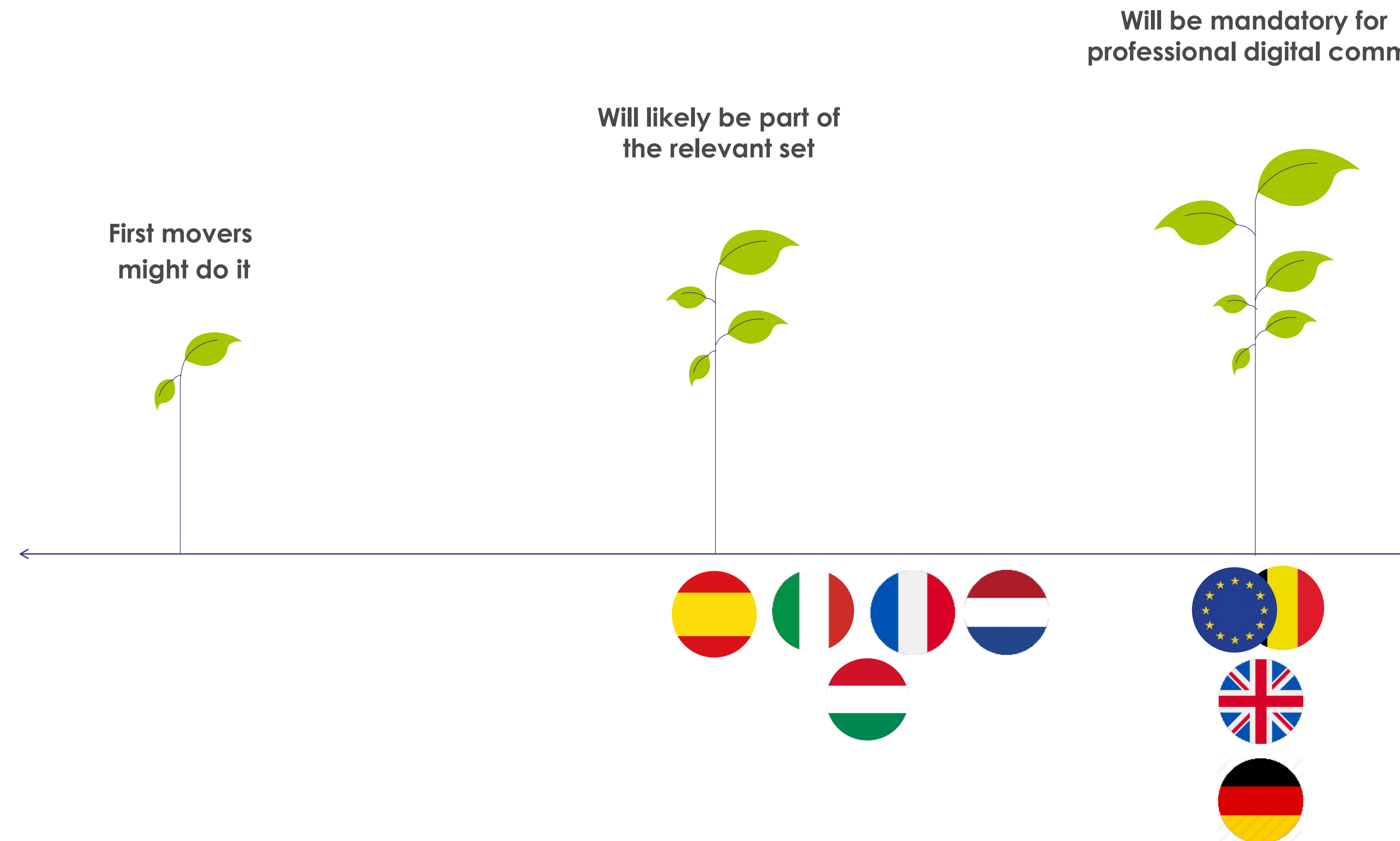
"Social media remains unpredictable with the current landscape, which means we need an agile approach as we head into 2023. You must truly understand your audience to pivot and reach them via effective ways."



PETER WILSON,
HEAD OF DIGITAL REPUTATION

"Quite simply, only social and digital allows you to be granular – targeting niche audiences efficiently, without any waste. The performance metrics will also prove your effectiveness."

HOW CONCERNING IS THIS TREND IN YOUR MARKET?





GENERATIVE AI IN CONTENT CREATION

REAPING THE BENEFITS OF **GENERATIVE AI** IN CONTENT CREATION

With the rise of AI content generation platforms we enter a new era of the creative process. It will have its pivotal moment fairly soon and become a fully recognized and important element of the communicator's toolkit.

➤ **Algorithm takeover**

Algorithms have been writing news items for major media outlets for years now, but the technology started to disrupt the world of arts, video production, programming, and by now the scientific community of all areas.

➤ **Pivotal moment ahead**

These methods will become fully recognised elements of the communicator's toolkit pretty soon. Learning by doing and not only from your inputs but from millions of other users' AI-led text, video, audio or image generation will become ever more precise, fast and efficient.

➤ **No speak English? No problem**

Although most of the widely used story-generating systems speak English, the advent of more refined translation solutions (such as DeepL) will allow smaller, more exotic language groups to take their fair share of the trend.

➤ **Watch out for fake content**

This is the time to get familiar with the technology to reap its rewards of increased capacity on content generation for a fraction of the cost and time. Meanwhile, be ready to recognise its dark side: deepfakes and fraudulent content are increasingly common.



HOW CAN YOUR COMPANY **USE THIS TREND?**



SAVE ON RESOURCES

A prompt-based AI-generated image takes thirty seconds to make. Even with some added rounds, you can easily end up with the expected results while saving precious time, money and human resources that you would need to throw at it in the traditional way.



CREATE TRULY UNIQUE CONTENT

Best thing about AI-generated content is that you will get something nobody else has: it is one of its kind – be it text or graphics. It also means that you will always be able to mold the piece to your exact needs avoiding stock-fatigue.



YOU OWN IT

All of the above also means, that whatever you generate, you can use freely: most of the platforms acknowledge the prompt generator's (user's) ownership of the resulted content. We hope it will remain the case going forward.

WHAT OUR EXPERTS SAY ...



GABOR FADGYAS,
VP FOR STRATEGY

"The tectonic changes in content creation made possible by generative AI and other advances in technology will benefit brands in producing tailor made content for the fraction of the price and the time it requires today.

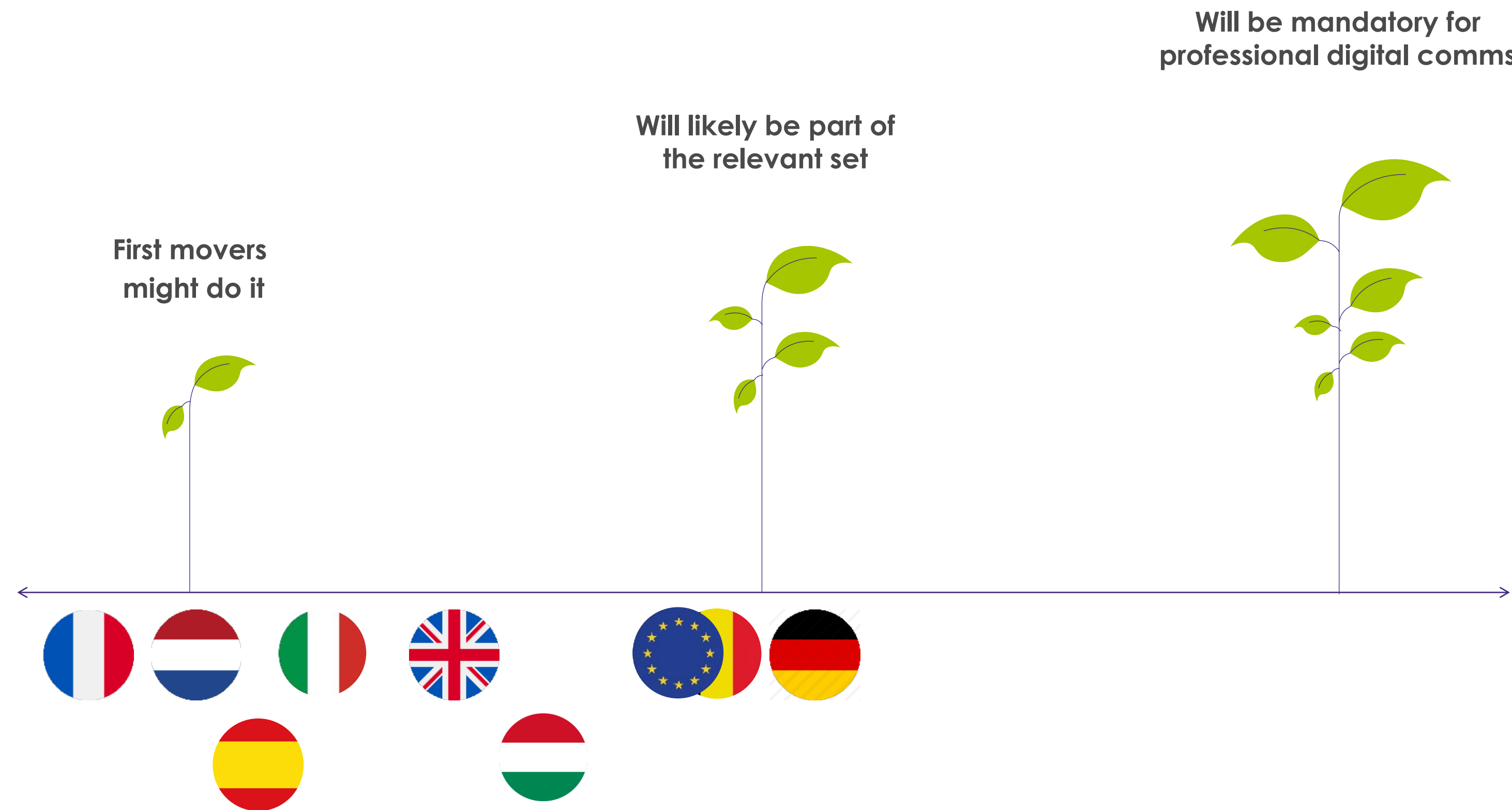
Also: it is great fun, and who does not want to try what it feels like being a superb artist cyborg without the itchy brain-implants ..."



MATT ROWE,
HEAD OF DIGITAL, SOCIAL, MEDIA AND PLATFORMS

"There is no question AI will play an increasingly prominent role in communications of the future. With technological advances continuing apace, 2023 could be a breakout year."

HOW CONCERNING IS THIS TREND IN YOUR MARKET?





THE CHALLENGE OF DIGITAL SUSTAINABILITY





HOW TO FACE THE **DIGITAL SUSTAINABILITY CHALLENGE** IN A DIGITALISED WORLD

In 2023, companies need to make sure that their environmental, social, and governance (ESG) processes are moved to the center of their strategy. With almost 50 billion devices connected to the internet, implementing digital sustainability demonstrates social consciousness and makes a genuine effort to limit our carbon footprint.

➤ **If the Internet was a country, it would be the 7th largest polluter**

The internet consumes a lot of electricity. 416.2TWh per year to be precise. To give you some perspective, that's more than the entire United Kingdom.

➤ **Actions speak louder than goals**

If we are going to make real progress in solving the climate and ecological crisis, then we need to be taking real action, now.

➤ **Imperfect solution are real solutions**

Adding a sustainability lens to digital transformation can help us reimagine different outcomes, revitalise our planet, create transformational ecosystems, address inequality, and help us in our journey to a more sustainable and resilient future.

➤ **Explore emerging technologies**

Neural network evolution, blockchain and metaverse are open new possibilities to shift high environmental impact activities into lower carbon impact projects.



HOW CAN YOUR COMPANY **USE THIS TREND?**



PAY CLOSE ATTENTION TO “DIGITAL BEHAVIORS”

This first rule is general: be aware of the fact that using digital technologies has an environmental impact. Switch from the abundance approach to a precise digital customer journey.



WHERE WE CAN MAKE THE DIFFERENCE

Analyse the impact your digital communication activities and think on how to mitigate them. Have you ever calculated the environmental impact of your website (there are many services on-line to do that)? How many images or video you provide? Are all necessary? More images = more footprint.



REVOLVE THE SYSTEM

Think creative and subvert the rules. For example, think on a dark mode layout or try to reduce the average time on page

WHAT OUR EXPERTS SAY ...



STEFANO ASSI,
VP HEAD OF STRATEGY

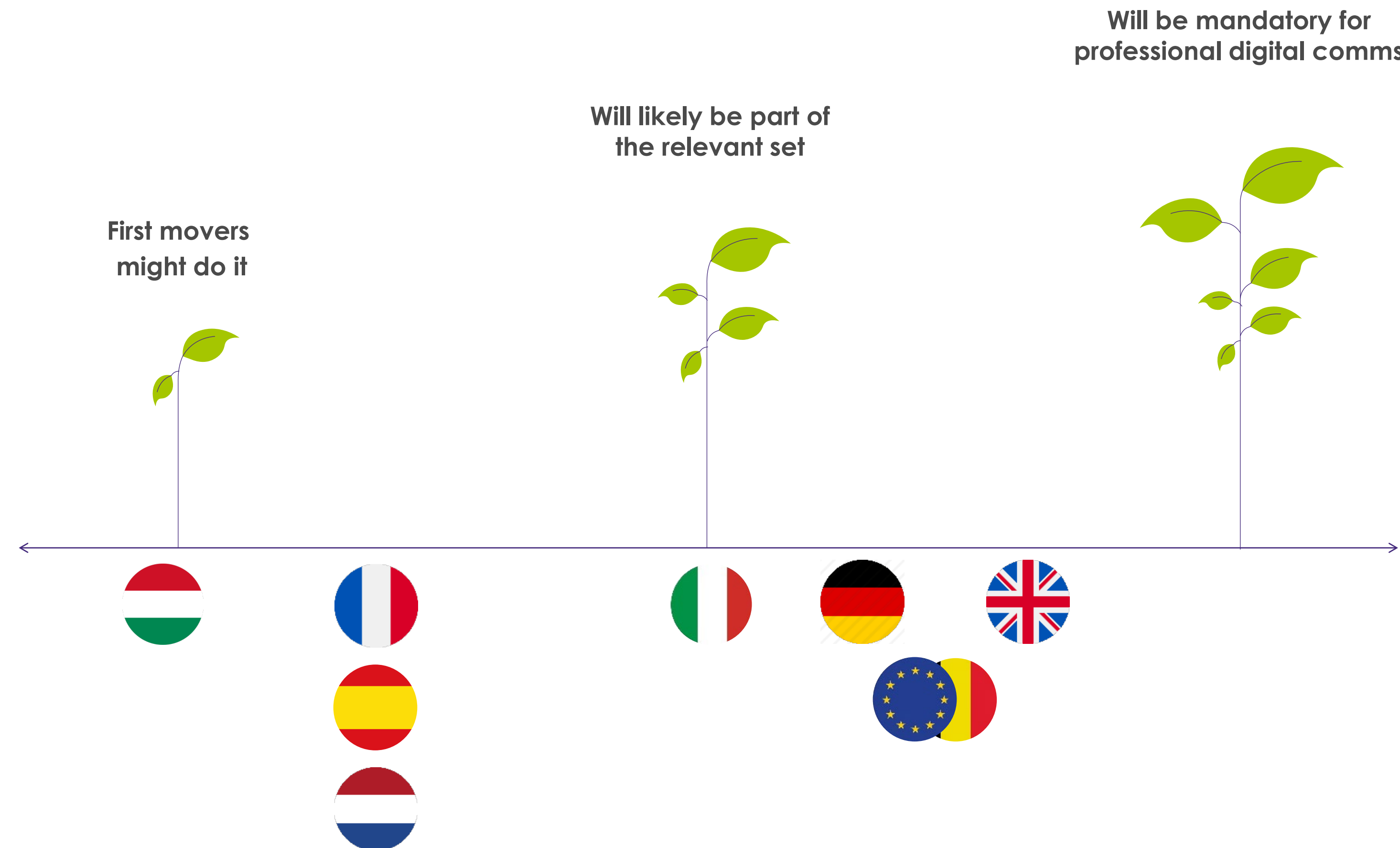
"The planet is experiencing unprecedented climate change and the internet is both part of the problem and the solution."



STEFANIE SÖHNCHEN,
VP DIGITAL STRATEGY

"The questions and challenges for brands from society concerning their ecological footprint increase. And they need to have believable, good answers. Digital comms offers many ways to show stakeholders that brands got their responsibility sorted for today and the future to participate or even lead in this area."

HOW CONCERNING IS THIS TREND IN YOUR MARKET?



THE EUROPEAN SOCIAL & DIGITAL LEADERSHIP TEAM



THE NETHERLANDS
Chéline Ruhof-de Vries
Head of Social, Digital & Innovation



GERMANY
Stefanie Söhnchen
VP Digital Strategy



ITALY
Stefano Assi
VP Head of Strategy



ENGLAND
Matt Rowe
Head of Digital, Social, Media and Platforms



FRANCE
Anne-Laure Barieraud
Head of Digital



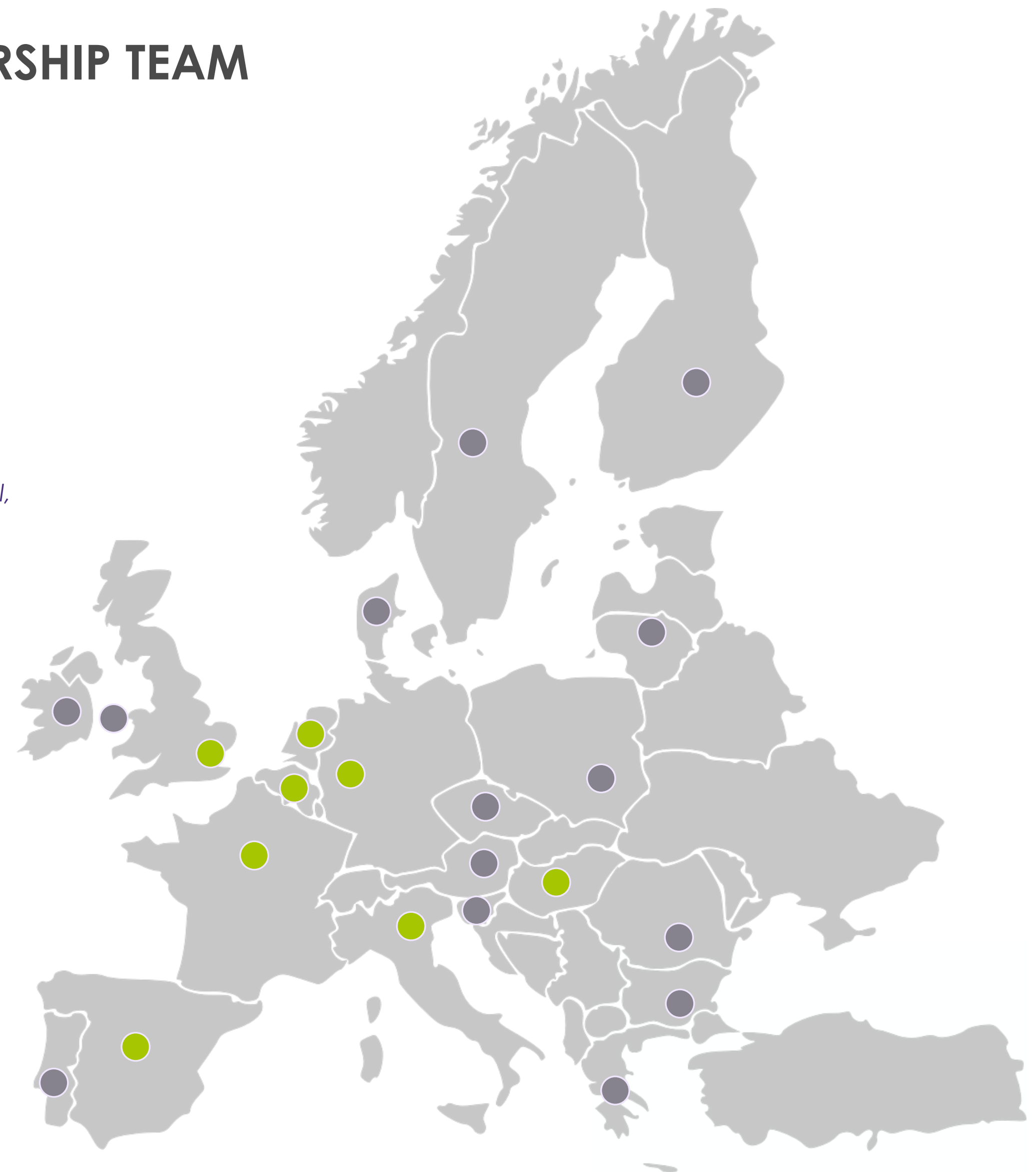
BRUSSELS//EU
Peter Wilson
Head of Digital Reputation EMEA



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Digital Director



HUNGARY
Gabor Fadgyas
VP for Strategy



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