

goat

# 2025 UNFILTERED

Predicting Consumer Behaviors  
through the Lens of TikTok

TRENDS. MOODS.  
CREATORS



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# INTRODUCTION

*Social media trends tell us more about our customers than we realize, from how they feel to what they want from brands. Even the smallest trend can signify something deeper - we just have to **look for it!***

In 2024, the biggest challenge for marketers is how to **"Move At The Speed of Social"**.

We're told we need to leverage trends, build communities, create cultural relevance... All in an era where these things seem to gain traction and become irrelevant in the space of a week or two. Marketers are having to move faster than ever before to respond to their audiences' interests and needs.

But in **desperately trying to chase trends** and hitch our brand-wagons to the latest viral TikTok sound or creator, we can sometimes forget the first rule of successful marketing:

## **DON'T WAIT FOR CONSUMERS TO TELL YOU WHAT THEY WANT.**

In the recent Disney+ documentary, *"In Vogue: The 90s"*, legendary designer Tom Ford (who famously turned around the fortunes of an ailing Gucci), remarked, "Customers don't know what they want. We tell them what they want".

Now of course, this refers to fashion trends and the need to never stay in the same place, however fashion and marketing trends aren't so different really. For brands to really stay relevant, we can't just move with the times. We need to move ahead of the times, and respond to the shifts and undercurrents that our customers themselves may not even be aware of.

Social media offers a window into what people are feeling, interested in, and searching for, **but are brands asking the right questions?** Instead of "What's trending?" and "What are our customers engaging with/searching for?", we should also be asking "What is the general mood of the nation?", "How is this being reflected in the trends, moments and movements they're participating in?", "How is this changing?", and "Where does our brand have a right to play?".



**Joanna Hughston**  
Head of Marketing, The Goat Agency

## IN THIS REPORT, WE'LL EXPLORE...

### TIKTOK AND CULTURE

2024 has been a truly pivotal year for TikTok. Its sheer impact on culture can't be denied - this app now reflects and even drives **popular culture, news and opinions**.

Let's look at how some of these TikTok trends have emerged, how they've evolved, and what they tell us about wider culture.

### 2025 UNFILTERED

We'll then uncover some of the bubbling undercurrents and shifts we could see happening in 2025. Can we *really* predict them? And if yes, *what do we do next?*



# TRENDS

## TIKTOK "TRENDS". WHY DO THEY HAPPEN?



TikTok trends have become so embedded in global culture, originating from lip sync challenges and viral dances during the pandemic, to now regularly breaking into mainstream media (and even coining new dictionary-official words and phrases).

So why do social media trends captivate us so much?

### 1. THE END OF THE MAJORITY (BUT WE STILL NEED TO FEEL A PART OF SOMETHING)

*"Have you seen this TikTok trend?"*

Thanks to streaming platforms and the internet, we now have more choice than ever before. Even in the 2010s, there used to be certain shows or cultural events and moments where it felt like all of your peers participated in them. Whether it was the X Factor final on a Saturday night or the MTV Video Music Awards, you could gather on a Monday to discuss the events in a communal way; aka at the **"water cooler"**.

Now though, it's hard to feel as bonded culturally. Social media has given us access to niche content, creators and communities, but this can also leave us feeling disconnected. Trends provide us with something similar to a water cooler moment - especially for young people. "Have you seen this TikTok trend?" is now the same as asking about a new TV show, movie or album.



## 2. WE'RE LONELIER THAN EVER, BUT TRENDS HELP US FEEL LESS ISOLATED.

*"Do you feel the same way?"*

Data shows that Gen Z and millennials are lonelier than ever. **The Cigna Loneliness Index** found that three in five US adults "sometimes" or "always" felt lonely, and a report by think tank, **Onward**, found that one in five Britons aged 18-24 have "one or no close friends", a proportion that has tripled in the past decade" (Cigna 2020, Onward 2024).

TikTok trends may seem silly to some, but they're actually a very clear signal of human bonding. You find a trend funny so share it with your friend and they find it funny too? That's a bonding moment. And for more meaningful trends like "**The Man vs Bear**" or "**Micro Feminism**" (more on these later), they can be a way of communicating something important to you personally, and having others share their own experiences. Ultimately a shared trend tells us "*Someone else resonates with this/finds it interesting/feels the same way too*".



## 3. WE WANT TO BE PART OF A COMMUNITY, BUT WE'RE STILL INDIVIDUALS.

*"How does this trend apply to me?"*

It's often a criticism thrown at younger generations by their elders; "*This generation is so individualistic*". And in some ways, this is true. Social media has given everyone a voice, however some have argued that this can be problematic as people tend to operate in an echo chamber and believe their individual needs and opinions (and those of the people they follow) are more important and prevalent than others.

Trends are a perfect example of how this translates onto social media. Yes, we want to feel like we have something in common with others, but we also want to showcase our own individual take on it. **How does this trend apply to me?** How does it reflect *my own* story and personality? How can I make *my* mark on it?

# THE 5 TYPES OF TIKTOK TRENDS

- 1 LIGHTNING STRIKES
- 2 POP CULTURE CROSSOVER
- 3 TRENDS THAT BUILD
- 4 CONSCIOUS SOCIOPOLITICAL
- 5 UNCONSCIOUS SOCIOPOLITICAL



# 1. LIGHTNING STRIKES

*These are the trends that seemingly come out of nowhere. They're usually triggered by a creator, cultural moment or a piece of news, and quickly gather steam.*



## VERY DEMURE

Demure Fall exploded in August 2024 after a viral sound from creator **Jools Lebron**. In the original video, Lebron is seen satirically mocking the way that Gen Z dress for the office - *"I'm very modest, I'm very mindful. I don't go to work with a green cut crease"*.

Following a summer defined by "Brat", the idea of a **Demure Fall** in which people (especially women) should aspire to be more mindful and cutesy offered an antithesis. Demure was everywhere and overnight Jools Lebron seemingly became a household name, picking up collaborations with brands like **e.l.f. Cosmetics**, **Delta** and **CVS**.



## LETTING MY GEN Z COLLEAGUE WRITE THE MARKETING SCRIPT...

Tapping into the power of employee-generated content, this particular trend exploded in September 2023. It features a boomer-age employee reading from a script that uses recognisable Gen Z slang. Think *"Yass Queen"*, *"Slay"*, *"Rizz"* and *"Brat-Coded"*.

People loved this **generational collision**, and the self-deprecation of these Gen Z/Boomers good-naturedly poking fun at each other. It was popularized by brands like **Curry's**, but people also loved versions from the likes of **Jacksonville Zoo** or **Fyfield Manor B&B** in Oxfordshire, England.





## CHAPPELL ROAN VS X FACTOR RACHEL

A popular TikTok trend is taking TV quotes or snippets and applying them to modern songs as a backing track.

Arguably the biggest in 2024 was the Chappell Roan vs Rachel from X Factor trend, in which a clever music creator realized that this iconic negative audition fit perfectly with the intro to Chappell Roan's **Super Graphic Ultra Modern Girl**. Cue people lip syncing and dancing along to the words *"No I'm lazy at the moment"*.



## LOOKING FOR A MAN IN FINANCE

Singer and creator **Megan Boni** (known as @girl\_on\_couch on TikTok) created the smash Spotify hit and TikTok trend, "Man In Finance". Megan appealed to her followers to help her write "the song of the summer" using the lyrics, *"I'm looking for a man in finance / trust fund / 6'5 / blue eyes"*. A DJ/creator set it to a catchy background beat, and a song was born.

One of our favorite versions of the trend was from British premium clothing retailer, **Reiss**, who organized a flash mob of suited men in one of London's finance hotspots to advertise their menswear collection. Check out our own Goat version [here!](#)



# HOW CAN BRANDS PARTICIPATE IN THE “LIGHTNING STRIKES”?



*Due to the fast nature of these trends, brands really have a limited time to jump on them before seemingly becoming irrelevant. Ideally, you'd release something within the first 72 hours of a trend taking off!*

*It's crucial to have your ear to the ground and to be actively involved with niche communities so you can spot when a lightning strikes, and already have a clear idea of the way your brand should respond.*



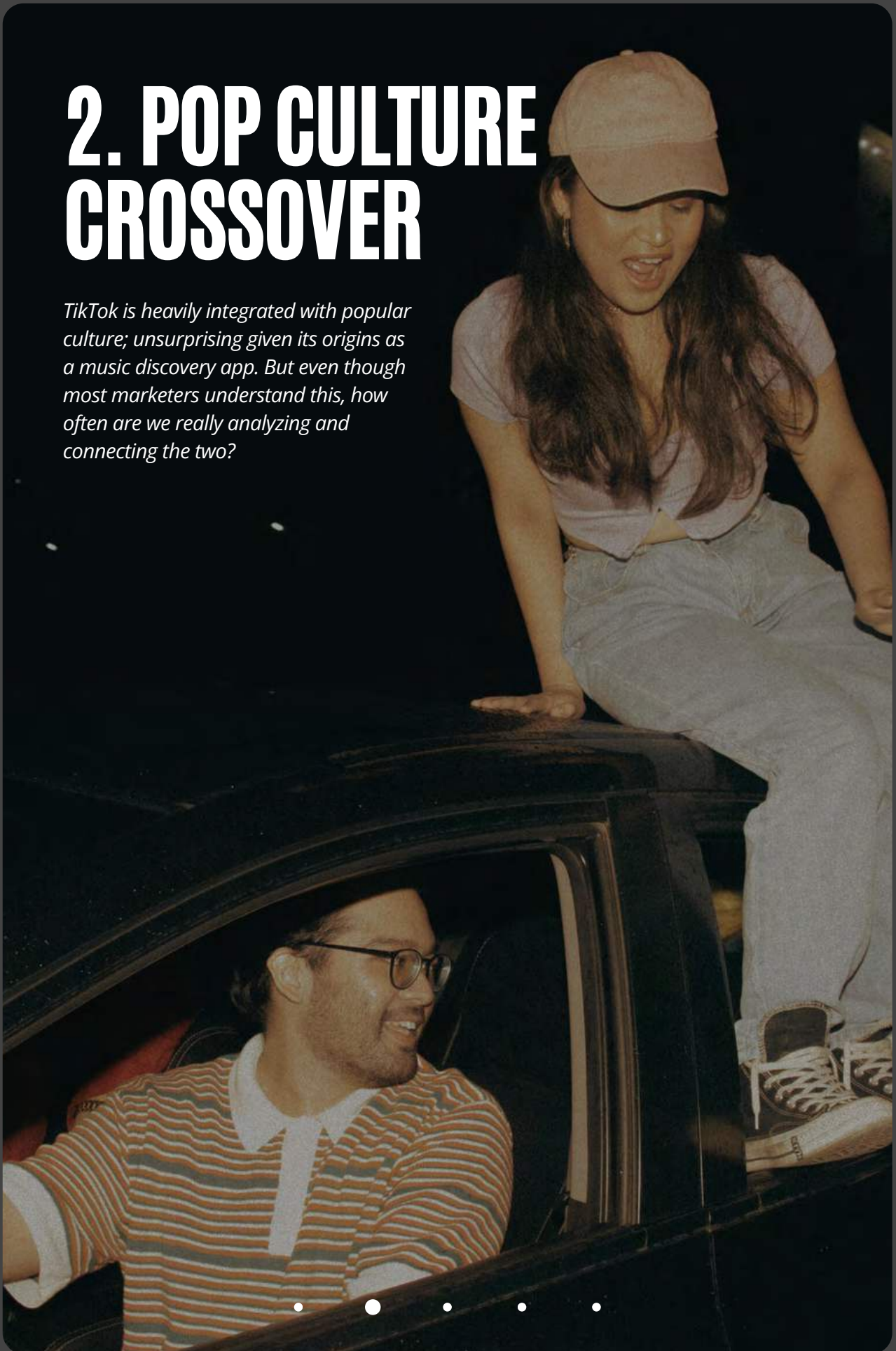
**IDEALLY, YOU'D  
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HOURS OF A TREND  
TAKING OFF!**

## CONSIDER:

- *Why has this trend captured people's **attention and interest**?*
- *Does it make sense for **your brand's social media personality** to take part?*
- *Can you **add your own spin** on this trend?*
- *Are you able to get the content live within the next **48 hours**?*

## 2. POP CULTURE CROSSOVER

*TikTok is heavily integrated with popular culture; unsurprising given its origins as a music discovery app. But even though most marketers understand this, how often are we really analyzing and connecting the two?*



## BRITISH CULTURE INTRIGUE

This summer, we saw a spike in interest around British culture, or so-called “British Core”. Whether it was exploring the countryside and cities, showcasing classic British architecture, or spotlighting British fashion, music and film/TV, people couldn’t get enough!

But what drove this? Unsurprisingly much of it was driven by the “**Taylor Swift Effect**”. Time Magazine’s Person of The Year for 2023, the influential artist closed out her European leg of the record-breaking Eras Tour in London, featured a song called “So Long London” on her latest hit album, and had two highly publicized breakups with actor Joe Alwyn and lead singer of the band 1975, Matty Healy (both British). All of this sparked a number of TikTok trends and got people interested in Britain more generally.

Following that, there was also the announcement of the **Oasis reunion tour**; something fans have been wishing and hoping for for years. Expect to see this British Core fascination continue into 2025!



## #BRITISHCORE #BRITCORE

What’s that you ask? Well, Britcore refers specifically to the celebration of the **more naff side of British culture**. It’s been around for a while but we saw a resurgence in reaction to the fascination with Britain more generally, as people wanted to show the underbelly of being a true Brit. Think Greggs sausage rolls, The Only Way is Essex, Eastenders’ Kat Slater in leopard print, and putting a traffic cone on your head after a few too many pints on a Friday night...

This was real British people’s response to the idealistic and Instagram-filtered version of British culture. But don’t be fooled, it’s not meant to be offensive! Think of it as Brits looking fondly at some of the culture that wouldn’t make it into the Visit Britain adverts but which truly make us feel at home.



## QUIET LUXE / STEALTH WEALTH

"She's brought a ludicrously capricious bag" uttered fan favourite Tom Wambsgan on HBO's **Succession**, reigniting a conversation around Quiet Luxe and Stealth Wealth.

Quiet Luxe was coined by TikTok users as a way to describe an aesthetic and style that **"gives wealthy"** without trying too hard. The idea is that most very wealthy people don't actually cover themselves in labels or present themselves in a flashy way, but instead favor high quality, functional, timeless and elegant style.

Popularized by shows like *Succession* and *Gossip Girl*, as well as it-girl [Sofia Richie's viral Chanel-sponsored wedding](#) (and who could forget Gwyneth Paltrow's understated elegance during her infamous ski accident trial?), the Quiet Luxe/Stealth Wealth trend may also be driven by something even bigger.

In times of economic downturn, people tend to seek out **quality, functionality** and **timelessness** over big, bold garishness. After the 2008 financial crash, gone was the maximalism that categorized the late 90s, and instead it was all about subtle fashions. Given we had a global pandemic at the turn of this decade, it's perhaps unsurprising that brands and consumers responded in the same way.



## HUN CULTURE

Our final example of a Pop Culture Crossover comes from beloved Hun Culture. Now, this is somewhat connected to Britcore in that it represents a **niche subculture** in Britain, specifically inhabited by women and gay men.

As The Guardian reports, *"Resonating chiefly with women and gay men, celebrating the naff and deifying soap actors, reality TV icons and female pop stars, Hun Culture mixes nostalgia, camp humor and irony-laced national pride. If US social media influencers are preened, puckered and always on sponsored holidays, huns are sloppy, sarcastic and off on their 'holibobs.'*" (The Guardian, 2022).

How this plays out on TikTok tends to be through reaction videos or short clips of **nostalgic TV moments** featuring so-called "Huns" (think soapstars, reality stars, girl bands), lip-syncing videos, applying a famous "sound" to a real-life situation, or just celebrating what it is to be a "Hun".



# HOW CAN BRANDS PARTICIPATE IN THE “POP CULTURE CROSSOVER” TRENDS?



## THESE CROSSOVERS TEND TO HAPPEN IN ONE OF TWO WAYS:

### 1. A moment in time:

*This is where something in pop culture sparks interest or engagement in a particular theme (like what happened with Taylor Swift and British Culture). For these, you need to have your finger on the pulse but you can also keep an eye on what's coming up in the artistic calendar. Is a new series of a popular TV show coming out? Is a famous artist releasing a new album? Has a big story broken about popular celebrities? All of these can spark a trend so you should track the things that may be relevant to your audiences.*

### 2. An evolving subculture:

*Subcultures like Hun Culture are ever growing and changing. But to be involved in these you must have some sort of history and genuine relevance. Supermarket retailer, **Lidl**, did a fantastic TikTok advert and partnership with the Godfather of Hun Culture, “**Hunsnet**”, as well as Hun Icon, Martine Mccutcheon. They really played up to it but also brought in an influencer that actually speaks to this community, meaning it felt authentic and true to the brand.*

Ultimately, marketers need to pay more attention to what's happening in popular culture than they do in advertising culture. Remember that most consumers don't really care about adverts. But they do care about what's popular.

“  
REMEMBER THAT  
MOST CONSUMERS  
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# 3. TRENDS THAT BUILD

*Here's where TikTok trends really start to get interesting... Because these are the trends that start as one thing before becoming something else entirely.*



# ROMAN EMPIRE

At the end of 2023, no one could escape the Roman Empire trend - even **Ryan Reynolds** took part!

## (I) SO, HOW DID IT START?

The "Roman Empire" question appeared to have been circulating on online messaging boards and meme websites for many years, with users discussing how often they think about the Roman Empire, and why it is that so many men are fascinated by it.

But in late 2023, it truly catapulted into the mainstream thanks to TikTok. Women were asking their male partners how often they thought about the Roman Empire, and the results were surprising! It really seemed to be true that men think about this period of history much more regularly than we'd expect.

## (III) WHAT HAPPENED NEXT?

Well, the next step was to bring it into today's world. Instead of history, which cultural or even personal moments do people think about on the regular? Many TikTok-ers referenced pop culture moments from the big to the niche (Miley Cyrus's cringy VMA performance; when The Hills' Lauren told Heidi "I want to forgive you, and I want to forget you"; when Nasty Nick was caught cheating in the first season of Big Brother UK... you get the idea!).

But it also led to people sharing personal stories from their own life. "My Roman Empire is that perfect date I went on then never heard from them again". "My Roman Empire is the girl who bullied me in school". "My Roman Empire is the time me and my friends got caught doing \*something embarrassing\*". It became a way for people to share things that matter to them!

## (II) HOW DID IT BUILD?

The conversation soon shifted into what women's versions of the Roman Empire might be, with popular answers including The Titanic, Queen Victoria's England, Henry VIII's Six Wives, and the Russian Romanov family.

This gave rise to questions around what this represents. Do men care more about things that are "built" (e.g. empires, buildings, armies, civilisations...), whilst women care more about people and the lives they led? Of course these lean into stereotypes, but it did generate discussion which is what kept the trend alive!

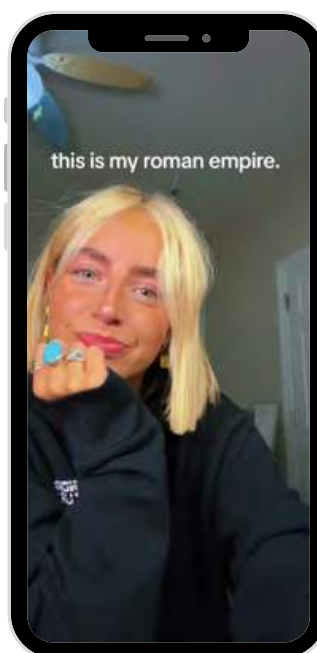
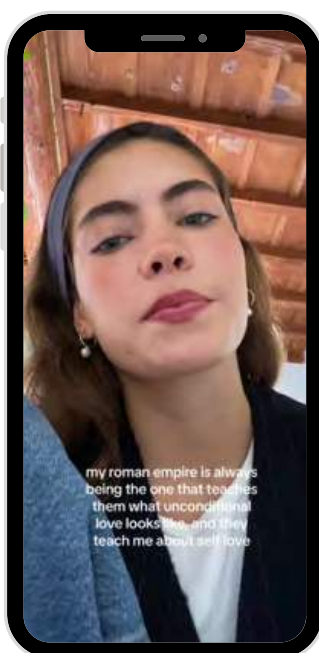


## (IV) TAKING A SERIOUS TURN

As with many of these TikTok trends, soon people start to relate them to something more meaningful. In this case, many women used the Roman Empire trend to raise awareness of the things that women have to be constantly thinking about that men may not appreciate. Whilst men are thinking about the Roman Empire, maybe many women are dealing with not being taken seriously by their Doctors, the unequal mental and physical load in their households, getting access to reproductive care, or worrying about personal safety.

## (V) WHERE ARE WE NOW?

"Roman Empire" is now a part of our vernacular, with many people using it regularly to describe something that they think about often or that has a lot of meaning and significance to them.





# HOW CAN BRANDS PARTICIPATE IN THE “TRENDS THAT BUILD”?

“  
**WHEN YOU START TO SEE THIS TREND EMERGE TO SIT DOWN WITH YOUR WIDER TEAM OR AGENCY AND TALK IT THROUGH**

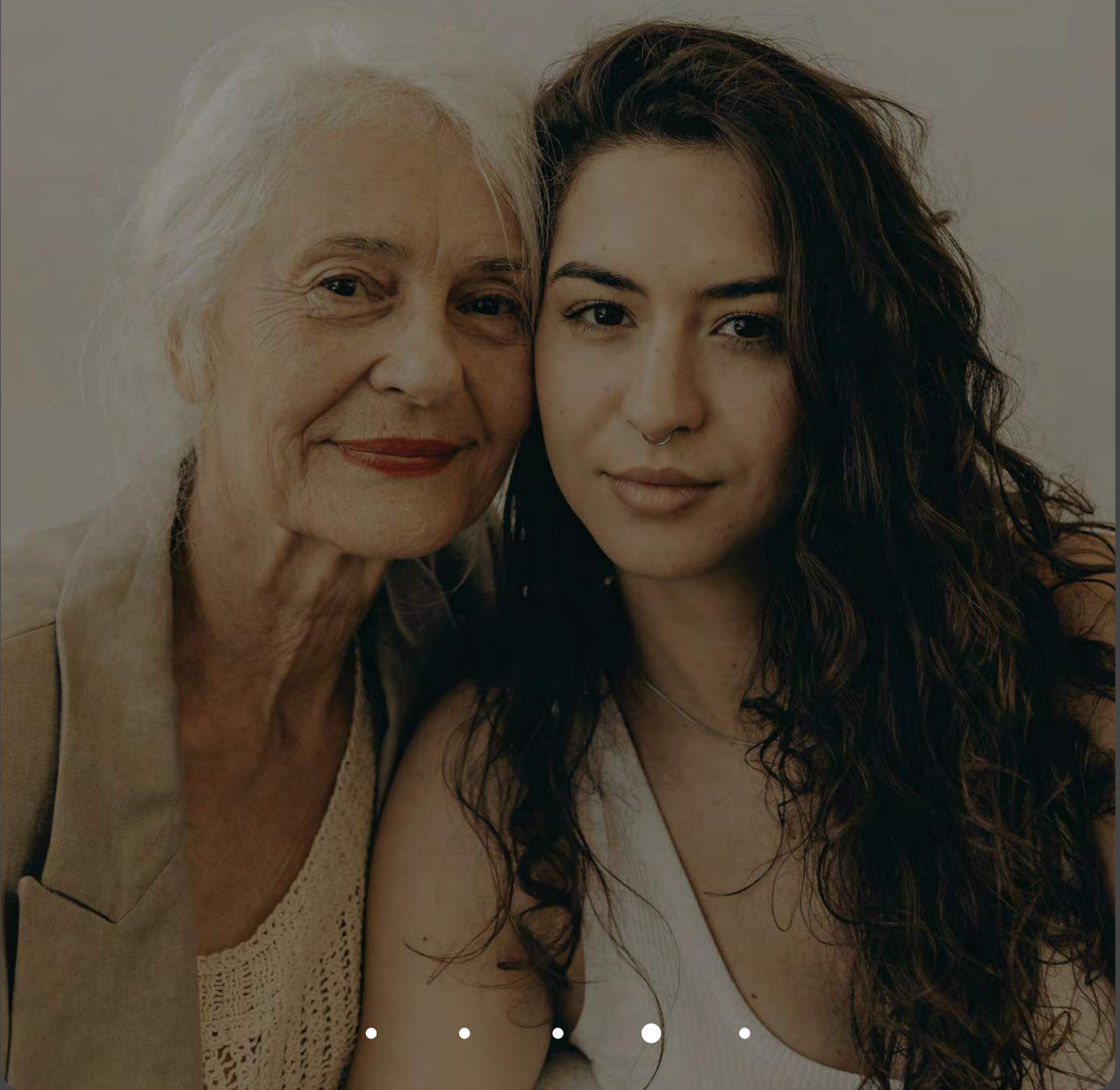
Unlike the “Lightning Strikes”, these trends tend to evolve over a period of weeks (and even months), so you have more opportunity to participate.

At the same time, it’s crucial to have your own spin and take. As you can see, these trends don’t stay in one place, and their significance and language shifts and evolves, so **what does your brand actually have to say?** Do you have something valuable and meaningful to add? Is this authentic or forced? Creators can again be a helpful source here for inspiration and reflecting your brand through their own personal interpretations of a trend that builds.

It’s also a good idea when you start to see this trend emerge to sit down with your wider team or agency and talk it through. *Where do you think this trend might go? Do you anticipate any twists and turns, and how might you prepare (or even push it forward yourself)?*

# 4. CONSCIOUS SOCIOPOLITICAL

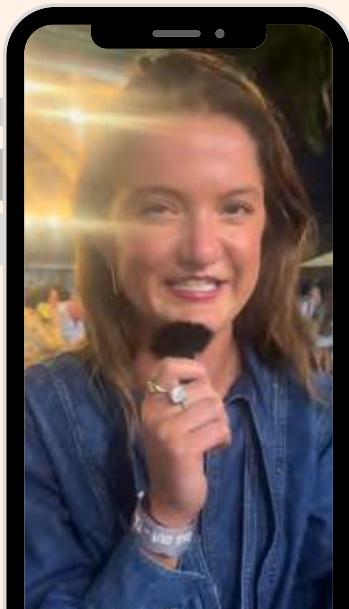
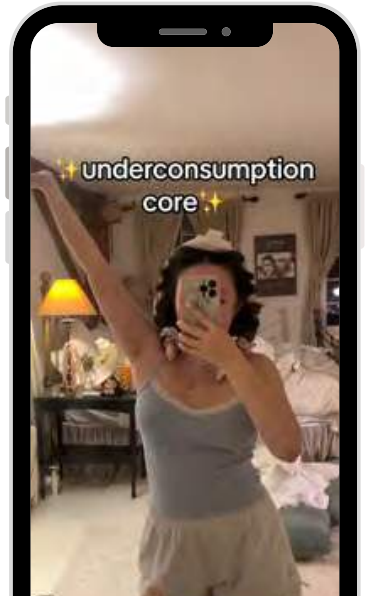
*Gen Z has been labeled the “activist generation”, and TikTok is increasingly the platform via which they advocate for political, cultural and social issues.*



## UNDERCONSUMPTION CORE

Every year, a new trend seems to circulate that encourages people to buy and consume less. In 2023, we had “De-Influencing”, before that it was the “Anti-Haul”, and in 2024, it’s “Underconsumption Core”.

This latter trend popped up in the summer of 2024 and featured creators showing how they actively make the effort to consume less. From cutting open the bottom of shampoo bottles to ensure you’ve used it all up, to getting clothes tailored and repaired rather than buying new items, the suggestions could be very simple! Of course, this did lead to some questions over whether UnderConsumption Core is just glamorizing or giving a name to something that many people have to do because of their financial situation. But others have argued that if it makes people think twice before buying or wasting, then it can only be a positive thing, right?



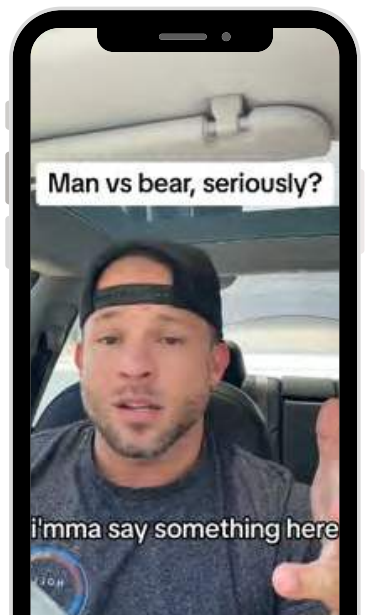
## MICROFEMINISM

Microfeminism crossed over into TikTok in the spring of 2023. The trend sees women (and men) sharing small but intentional actions they’re taking to fight negative gender stereotypes. Similar to the conversation in recent years around racial or sexual “Microaggressions” and how these can still be harmful, even if they don’t seem “big” or “direct”. Well, Microfeminism was about reclaiming these, and we saw TikTok-ers sharing examples like “Always addressing the women on email first”, “Using female pronouns as standard rather than male”, or “Ensuring to speak up when a woman is interrupted by a male colleague in a meeting”. Of course, this has been around for decades, but TikTok allowed advocates to really drive awareness to younger generations and also share experiences with others.

## THE MAN VS THE BEAR

Another trend that aims to draw attention to the experiences of many women... The Man vs The Bear debate erupted on TikTok in 2024 after women started debating whether they’d rather be alone in a forest with a strange man or a bear. The results were pretty shocking, with many women saying they’d rather take their chances with the bear.

Where it got really interesting on TikTok was when women started asking their male partners/friends/family members the same question e.g. “Do you think it’s better for a woman to be alone in the forest with a man or a bear?”. Of course, many men chose the bear. But often their answers would change when asked about a specific woman they cared about e.g. their daughter/sister/mother/partner/wife. The reactions that men had were often pretty eye-opening, as they realized through using such a metaphor just how real the fear around personal safety is for women.



## HOW CAN BRANDS PARTICIPATE IN THE “CONSCIOUS SOCIPOLITICAL” TRENDS?



These types of trends are particularly sensitive, as they will often touch on societal issues that people care deeply about.

Just as with other movements, brands should really only participate here if they've “done the work”, so to speak.

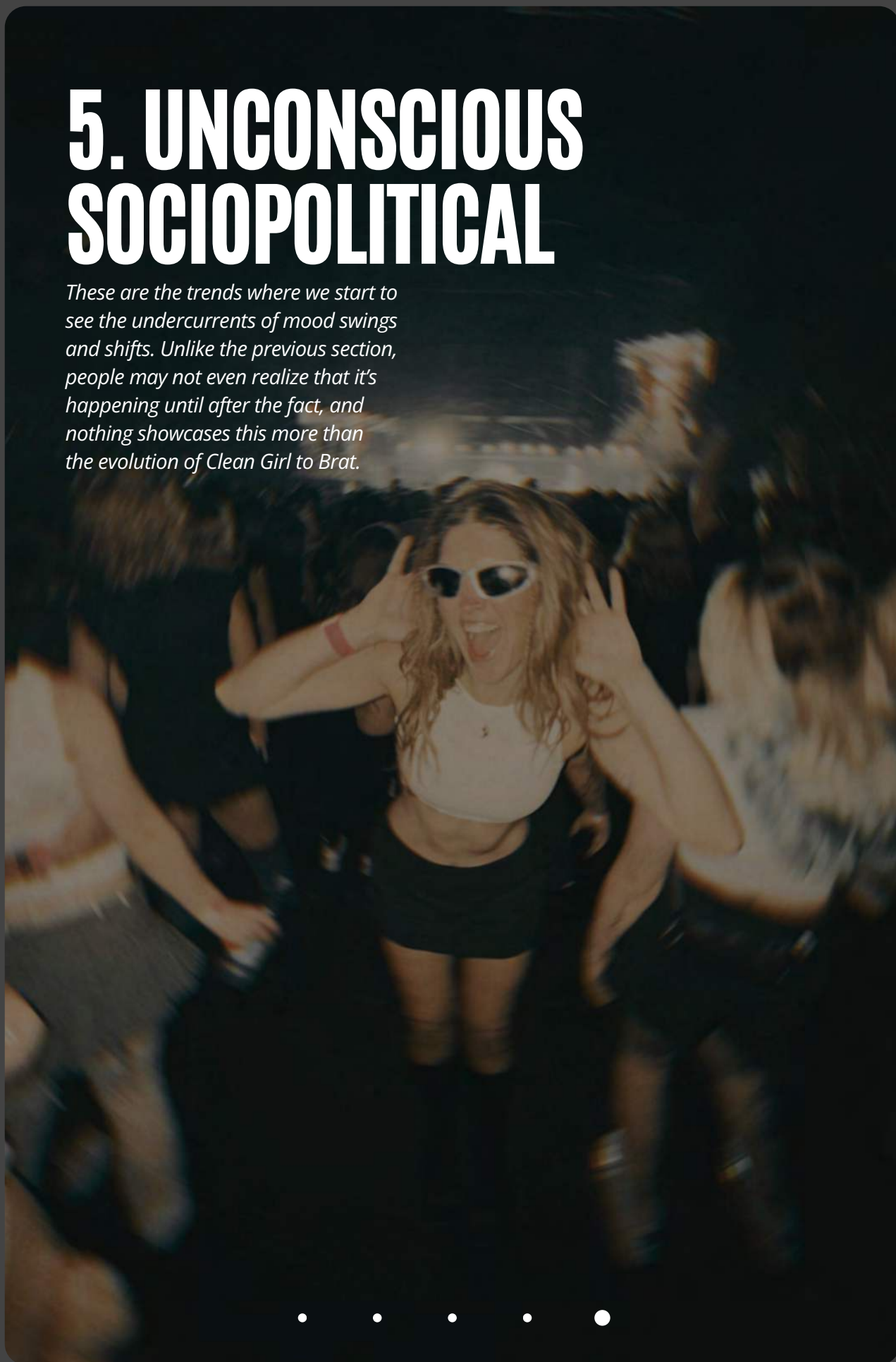
The likes of Levi's and e.l.f. Cosmetics are able to meaningfully activate around Pride Month because they have spent years building credibility within the LGBTQ+ community. Dove were welcomed in speaking out against AI-generated models and their potential impact on body positivity because they have already been part of the conversation.

With these trends, it's the same rule. However, it's important for marketers to understand and have these social conversations front of mind. For example, we expect to see more female-led trends in 2025 due to the ongoing debates around threats to women's rights, so keeping track of these types of responses is important for your team's social literacy. And instead of thinking about your own brand first, think about how you can uplift and empower creators in this space.

“  
JUST AS WITH OTHER  
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# 5. UNCONSCIOUS SOCIOPOLITICAL

*These are the trends where we start to see the undercurrents of mood swings and shifts. Unlike the previous section, people may not even realize that it's happening until after the fact, and nothing showcases this more than the evolution of Clean Girl to Brat.*





# CLEAN GIRL > BRAT



The Clean Girl aesthetic has dominated TikTok since the early 2020s. Tracing its origins back to women of color, who celebrated the “I woke up like this” appearance of neutral nails, slicked back buns, and minimal makeup and fashions, it emerged as the most popular “Beauty Aesthetic” on TikTok around the pandemic (Boulevard, 2024).

When you think of Clean Girl, you usually think of brands like **Glossier**, **Milk Makeup**, and **Drunk Elephant**, as well as it-girls like Hailey Bieber, Kendall Jenner and Sofia Richie (note not the women of color who many argue popularized the style...). Similar aesthetics include **Quiet Luxe**, **Glass Skin**, and **Beige Influence**.

But then something started happening in 2024... Suddenly glamor and maximalism was back. Think **Mob Wife** and **Indie Sleaze**, think smokey eyeshadow, dark lipstick and big hair.

## AND THEN CAME BRAT.



Brat was the cultural phenomenon of this year, driven by Charli XCX's album of the same name. Suddenly Gen Z women in particular were all about celebrating the idea of being “Brat”; carefree, hedonistic, a bit wild, outspoken... And makeup and fashion (and even culture!) reflected this. Brat wasn't just a trend, it was a movement and to many it signaled the true end of the pandemic and the first half of a decade that's been characterized by staying in, prioritizing health and wellbeing, and let's be honest, being a bit “beige”.

Gen Z in particular embraced Brat and it showed us that many young people wanted to be out again. No more celebrating a Friday-night-in with face masks and hot cocoa, no more “beige influencers”, and deep down... no more pandemic.

We can almost track the feelings and moods of this decade so far by some of the celebrated trends.





# BUT BRAT SUMMER WAS MANUFACTURED, RIGHT?



Yes, to a huge extent *Brat Summer* was a highly successful and effective marketing campaign.

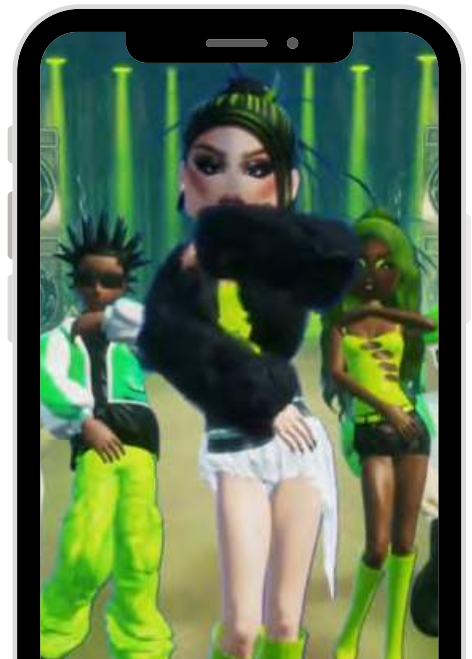
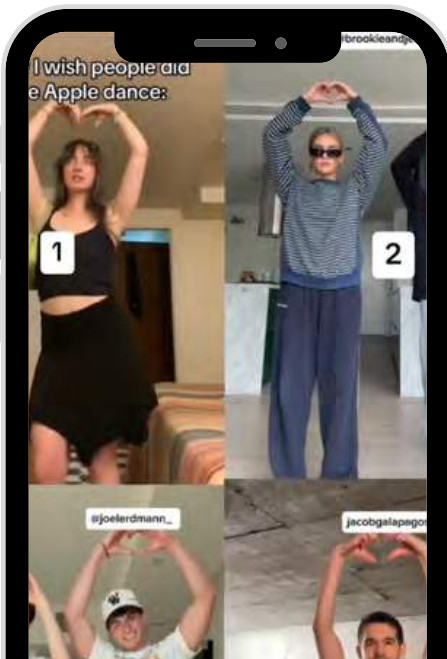
Starting with **Charli's** lime green "Brat Wall" in New York City and a tactical influencer and social media campaign (*the Apple dance anyone?*), then leading into multiple brand partnerships and a popular SWEAT Tour with another Gen Z-loved artist, **Troye Sivan**.

But Brat took off because it hit people at the right time. Would it have worked so well in 2023 summer? Maybe, but probably not.

It met people where they wanted to be and reflected the mood shift.

So, how can we be *more* like the Brat team?

**NF A\*** No Fixed Address @nfainc



# MOVE AT THE SPEED OF *SOCIAL*

*For brands that want to move fast and stay relevant on social, here's how you should be thinking.*

WHAT **YOU** STAND FOR / CARE ABOUT

WHAT YOUR **AUDIENCE** STANDS FOR / CARES ABOUT

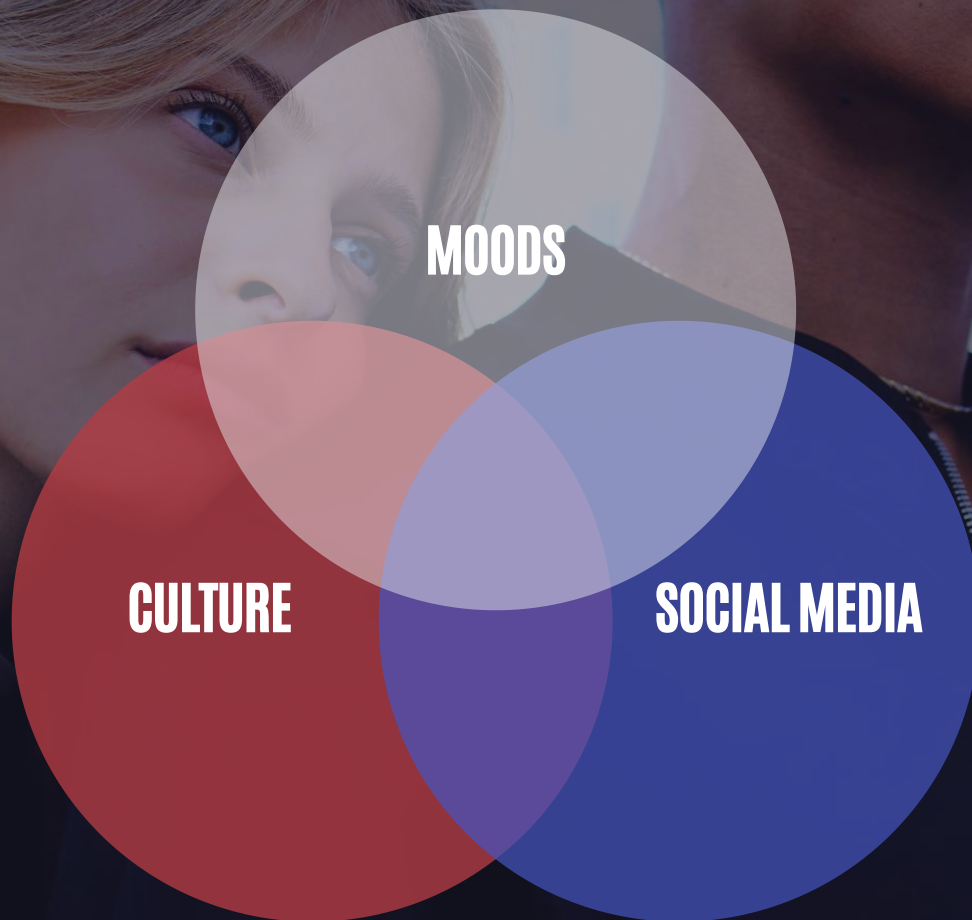
## IF YOUR BRAND WAS A CREATOR...

- Which trends would you participate in?
- Which trends would your audience participate in?
- Which creators would you follow and engage with?
- Who are the creators that can help tell your story?



# MOVE AT THE SPEED OF *CULTURE*

*But for brands that really want to move with the mood shift, become part of bigger cultural conversations, and connect with customers on a deeper level, here's how you should be thinking.*



- How are your audiences **feeling**?
- What do they **care** about?
- Which **cultural movements, moments, trends and shifts** do they participate in?
- How are they using **social media** to participate?

# MOODS

## 2020 TO 2024: WHAT HAVE WE NOTICED?

Let's reflect on some of the biggest shifts of the first half of the 2020s.



The rise of microtrends and aesthetics

Some desire for a return to macro trends

Cultural movements like Brat Summer, as well as the sheer magnitude of Taylor Swift's "The Eras Tour", have suggested a desire to return to macro trends, at least to some extent. People want to feel part of something bigger again, and there's a comfort in the mainstream.



TikTok reflects popular culture

TikTok drives popular culture

TikTok is now one of the single biggest factors for something becoming "popular". It's where the conversations are being had, it's where people are consuming the news, and it's where the biggest trends originate. Brands can no longer be passive on the platform, they must be active.



Brands communicate on social

Brands participate on social

Similar to the above point, it's no longer enough for brands to just push their messaging via social media advertising. In fact, we shouldn't even view it as social media advertising anymore; instead it should be about creating a brand persona through social media and participating as if you were a creator.



Clean Girl (Minimalist/ Safe/ Neutral)

Brat Girl (Maximalist/ Hedonistic/ Bold)

As we explored earlier, 2024 can be characterized as the year that people embraced maximalism again. We want loud imperfections and there's a push towards being wild and carefree, rather than polished and chic. Perhaps we'll see a return to the 90s rave and "ladette" culture over the next few years?



Shared crisis

Polycrisis

"In 2020, the world experienced a shared crisis, and in many ways this brought us together (at least for a short time). Now, with the pandemic in the rear view mirror, we feel like we're experiencing a period of intense polycrisis. This is partly driven by the fact we are now bombarded with this through a constant news cycle, however it could also explain why people are seeking more shared positive experiences and movements."



Nothing is in our power

We want to reclaim our power

The pandemic left everyone feeling powerless. Suddenly, we were at the hands of an unknown virus, and the entire world experienced at least some degree of compulsory quarantine and regulation. It makes sense that as time has passed, people now feel protective over their own freedom and want to feel a sense of autonomy again, as well as a desire to push boundaries.

● 2020 ● 2024

# 2025 TO 2030: WHAT CAN WE EXPECT?

*So, given what we know and what we've seen on social media and TikTok, can we predict some of the mood shifts for the second half of the decade?*



## 1. UNCERTAINTY

*We don't have the answers.*

We've spent the last few years reclaiming the autonomy and power we felt we lost during the pandemic, and it's resulted in a period of intense activism. But maybe now people feel a sense of uncertainty; do we actually have the right answers as all the upheavals and "**giving power back to the people**" haven't necessarily fixed things?

## 2. STRESS EMPOWERMENT

*Are we overwhelmed by moral duty?*

According to research, 63% of Gen Z "feel too much pressure to change the world" (Ketchum, 2023). Social media has given us the ability like never before to push for change. But after a tumultuous start to the decade, **are people getting tired?**

## 3. CYNICISM

*Gen Z are getting older...*

Gen Z has been nicknamed the "Activist Generation", but is this just because they're able to be more vocal through social media? If we look back through history, the late teen/twenty-somethings tend to be the drivers of popular culture, and it's also expected that this age group will be the most idealistic. They haven't had as many experiences, they haven't been in the workplace for very long, they haven't watched governments come and go...

Ultimately, **as we get older, many of us become less politically motivated and idealistic**, especially as people start to have children, get on the property ladder, and pay increasing taxes. They have also now witnessed the rise of movements like Body Positivity or focuses on Climate Change, to then see these appear to be challenged or slip backwards in 2024. So as Gen Z starts to grow into their later years, will they become more cynical?

## 4. SYMPATHETIC

*Gen Z are becoming more open to flaws.*

In a recent article by the BBC, author Helen Fielding claimed that her iconic character, **Bridget Jones**, had become "Back in fashion with Gen Z" (BBC, 2024).

Now, for a generation defined by activism, hustle culture, prioritization of mental and physical health, and rejection of stereotypes, Bridget is sort of the antithesis to Gen Z. She's neurotic, self-centered, obsessed with finding a man and losing weight, and regularly partakes in excessive drinking, smoking and bad decisions!

But as Gen Z ages, perhaps they're becoming more sympathetic to Bridget's position? After all, we've been trying to drive forward the body positivity movement for the past 10 years only for the explosion of Ozempic to seemingly take us back ten steps, and is it so bad to put emphasis on finding a relationship as well as a career?

As Bridget's creator, Helen Fielding, put it, "**With Bridget, it was about the gap between how you feel you're expected to be and how you actually are.**" So will we see more creators and influencers emerging that don't have it all together just yet?

## 5. POST ELECTION HIGHS & LOWS

*The world doesn't change overnight.*

2024 was a major year for elections globally, with a change of Government in both the US and the UK. Now inevitably, whatever the results, these political changes can trigger feelings of hope, excitement, and anticipation for change (whatever that might be). However, inevitably, for many people they start to realize that their **day-to-day life doesn't always change** that noticeably. Or maybe the changes they hoped to see don't end up coming to fruition.

Throughout 2025 and 2026, we can expect to see moods fluctuate accordingly as people start to feel excitement and/or frustration, then resignation, then frustration again!

## 6. APPETITE FOR RISK

*From fashion to business, people want to take a leap*

In a continuation of the above point, naturally political shifts can cause changes in how people perceive and approach risk. The pandemic led to many of us feeling more cautious, and this played out in the aesthetics and trends (Clean Girl, Beige Influencers, etc.) that dominated TikTok.

Now, in 2024 we've started to see a shift to **maximalism and bigger, bolder aesthetics**. Whether financially or just personally, many people are wanting to embrace risk again for the latter half of the decade.

## 7. CRAVING HUMAN CREATIVITY

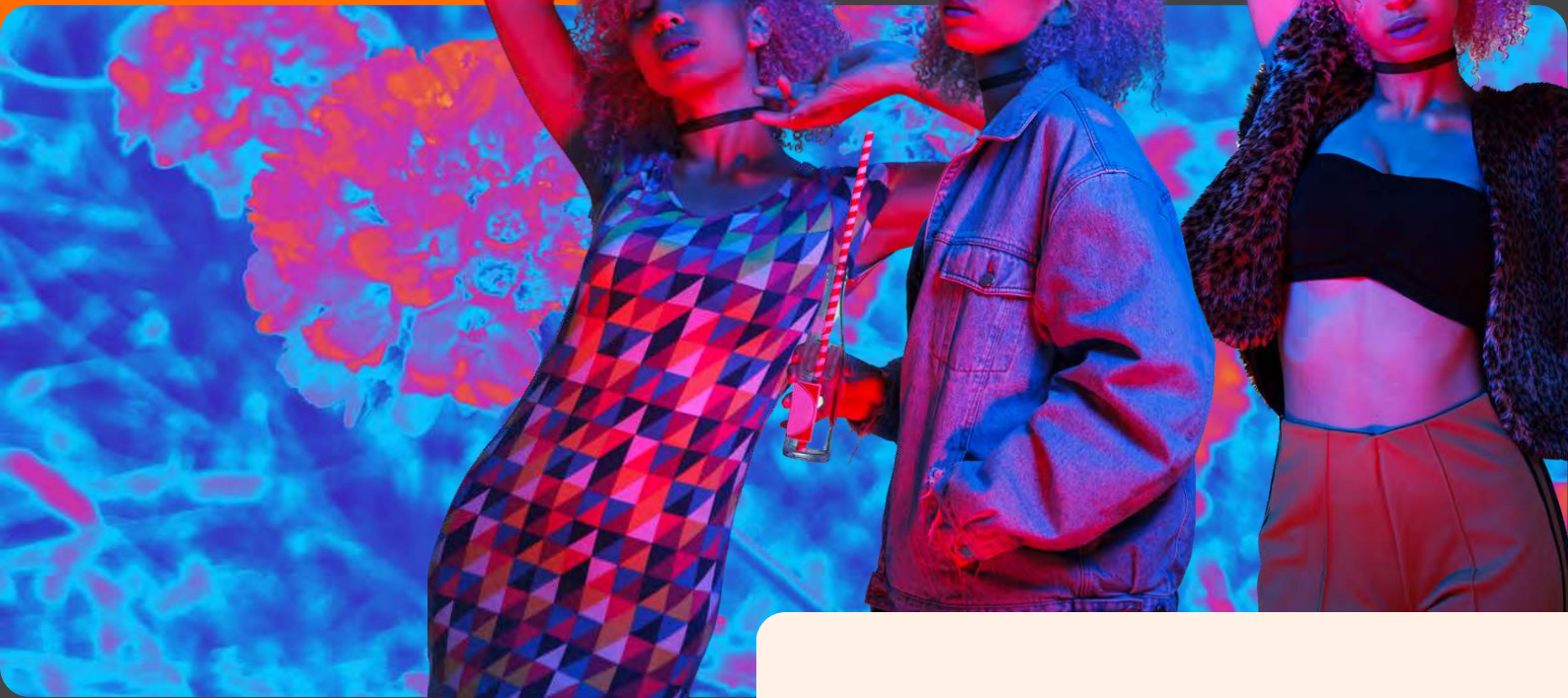
*AI intrigues us and feels inevitable, but we also feel nervous and protective*

Right now, people are wary of AI. The average person may feel intrigued by it, but they're naturally concerned. How will it impact my job? What could the impact be on future generations? Will it replace the need for human creativity and thinking? Are we even able to stop it at this point?

We are now much more experienced with major technological advancements and the impact they have on society, and there are a lot of conversations around whether social media, smartphones, the internet, have been positive things for humankind. At the same time though, we accept they're here to stay. So, whilst people accept AI is coming and it's coming fast, they still want to **protect human creativity and connection**. Brands that have rolled out virtual influencers have often received backlash instead of praise, and Reddit boards are full of people complaining that scripts and adverts are now just being written with AI. All of this may result in more people celebrating and seeking out human creativity and thinking, whilst slowly opening up to the possibilities of AI.



# SO, WHAT COULD THIS TELL US?



IN AN UNSTABLE  
WORLD OF POLYCRISIS  
WITH GEN Z GETTING  
OLDER, WE'RE SEEING  
MORE APPETITE FOR  
**LIGHT RELIEF**

In 2025, consumers may seek out joy, fun, and shared experiences that celebrate human creativity, as well as comforting content without a “message”.

In an unstable world of polycrisis with Gen Z getting older, we're seeing more appetite for light relief; from nostalgic rom-com series like **“Nobody Wants This”** and **“One Day”**, to the comeback of **Martha Stewart**, or even **Christmas ads** that put joy and humor at the heart.

At the same time, many people still want a continuation of the **maximalist “Brat”-esque culture** that we saw in the late 90s and early 00s, and they'll seek out experiences and macro trends that facilitate human connection.

# 5 WAYS THIS COULD INFORM YOUR INFLUENCER STRATEGY?

01

## GIVE PEOPLE SHARED EXPERIENCES

*Events and parties are officially back, and these are powerful tools for content creation.*

02

## LIGHT OVER HEAVY

*For your creative and campaign ideas, it may be better to focus on bringing people joy, humor or comfort, as opposed to focusing too much on heavier topics.*

03

## FLAWED HEROES

*People don't necessarily want to see the perfect clean aesthetics and ideal role models. Just like Brat and Bridget Jones, they may want to follow more influencers that are opinionated, outspoken, fun, and have more of a bold style.*

04

## SELF-ENJOYMENT OVER SELF-IMPROVEMENT

*People are always going to want to improve themselves to some extent, but the trend and mood signals suggest people want to prioritise fun and enjoyment over excessive "lessons". So think about how this informs your creative and creator partnerships.*

05

## DON'T TELL PEOPLE WHAT TO DO/BE

*The reclaiming of power and autonomy following the pandemic, as well as more of an appetite for risk, could suggest people don't want to be "told" by brands right now. Instead, work with creators to showcase how your brand or product can be a constant, consistent addition to their lives.*

“

**It's obviously important to recognise that every brand and target audience is different! But take the time to really examine the mood shifts and behavior trends you're seeing in people you want to engage with.“**

# CREATORS

## 8 TIKTOK CREATOR MARKETING PREDICTIONS FOR 2025

# 01



### SUSPENSE-FILLED EPISODIC TIKTOK CONTENT

In 2024, **"Who tf did I marry?"**, a 50-part TikTok series by creator ReesaTeesa attracted over 50 million views, leading to a potential TV adaption. In the series, Reesa detailed her "story of a pathological liar" (aka, her ex-husband), and all the things he allegedly lied about during their marriage - and she had people hooked!

In another case, a creator's creepy backyard discovery of a buried rug led to a police investigation (and a series of viral videos called **"What's in the rug?"**). Viewers for the videos

are in the tens of millions, peaking at 20 million on the episode where police arrive to investigate.

There's a real appetite for mystery/suspense style episodic content on TikTok, and we may start to see this type of storytelling being used more by brands and influencers in the next year, as the line between social media content and traditional broadcasting becomes increasingly blurred. Maybe we'll even see a brand-owned TikTok mystery series hosted by a creator?



# 02



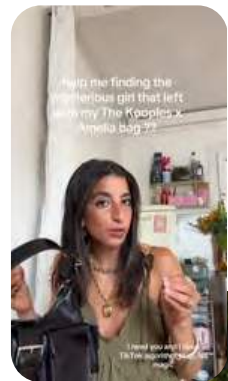
### CROSS-POLLINATION OF CREATOR CONTENT

At Paris Fashion Week 2024, fashion brand, **The Kooples**, hosted an influencer event in honor of their new "Amelia Bag". But it's what happened afterwards that really caught our attention...

Following the event, creator **SelmaKaciSebbagh**, shared a TikTok asking the algorithm to "do its magic" and help her find her missing Amelia Bag. She explained that one of the other creators accidentally left with the same identical bag and, after doing a "What's in her bag?" segment, she asked her followers to guess which creator may have been the culprit based on the items! A couple of days later, creator **Call Me Gattoni** released a TikTok revealing

herself as the accidental thief. She explained (in French) that she had accidentally taken the wrong bag, and then also showcased her own "What's in her bag?". They then followed up with a short "reunion" style TikTok!

This really feels like something that Emily in Paris would have pitched... But the collaboration worked incredibly well, with the three videos combined racking up nearly 4 million views and a tonne of comments/engagement. In 2025, we hope to see **more brands working with multiple influencers collaboratively**, helping the content to go further, and cross-pollinating to reach different audiences.



03

04



05

## AI THAT IMPRESSES, SURPRISES OR DELIGHTS, AND THAT CELEBRATES HUMAN CREATIVITY

As mentioned in the Mood Shifts section, people are still intrigued but nervous of AI, and they don't like to see it as a replacement, especially of a creator. However, if brands can work with creators to showcase their creativity through AI-powered tools, this could be really welcomed! But at the heart still needs to lie that human story and the "why behind the AI".



## UNEXPECTED CREATOR PARTNERSHIPS WITH NICHE (BUT REPETITIVE) CONTENT STYLES

From **Marc Jacobs** partnering with Trad Wife creator, **Nara Smith**, to **Burberry** seeking out Cole Palmer to host a tea party in honor of their AW Outerwear campaign, people love to see an unexpected collaboration on TikTok.

Take trendy French luxury brand, JACQUEMUS. They announced their new London store opening by tapping into one of TikTok's newest creator sensations, **Bemi Orojuogun**.

Auntie Bemi, as she's been lovingly nicknamed by followers, showcases London street scenes, particularly the famous **red double decker buses** in a very simple and slightly awkward way. TikTok users have fallen in love with her style - even the classic "millennial pause" - and the fact that the content seems so random without any real purpose to it!

The ad itself is shot just like all of Bemi's other content, so the viewer doesn't even necessarily realize it's an ad, and her invitation to "Come and have a cup of tea with us" is just so heartwarming that it immediately endears the viewers.

What people love most on TikTok is **genuine content from creators that have an evident passion or interest in something**. Just like Francis Borgeois and his trains, Bemi and her buses have become a beloved staple - brands should look out for these types of niche creators with repetitive content for future campaigns!



## FINDING INSPIRATION VIA REDDIT AND ONLINE COMMUNITIES (THEN USING INFLUENCERS TO SPREAD THE WORD!)

The most talked about Super Bowl ad of 2024? It had to be **CeraVe**...

In the weeks leading up to the Big Game, a bizarre rumor started circulating on the internet; that famous comedic actor, Michael Cera, was actually the inventor of CeraVe's moisturizer (Cera/CeraVe...). This was all debunked though when the ad was released, revealing it to all be a manufactured prank from the brand.

What made this ad so successful

was the intersection of cultural moments, social-first communities, and a good old fashioned "stunt". **The idea stemmed from Reddit** (a goldmine for finding communities and conversations related to your brand!), where some reddit-boards speculated that the actor was involved with CeraVe because of his surname.

Crucially, CeraVe then worked with hundreds of influencers in the lead up to "spread" this misinformation, as well as dermatologists and skincare influencers to create

content around the brand.

It's a reminder of why when planning a social campaign, we need to in many ways be "**chronically online**". It's only through mining these corners of the social media sphere to find nuggets of a conversation that we can come up with something truly memorable. As well as this, the ad would not have been as big of a success without influencers building the hype. In today's world, social and influencer needs to be central to marketing, even for a TV ad.



06

## CREATOR CAMPAIGNS... IN THE COMMENTS?

So much of social media and TikTok engagement takes place in the comments. It's a **constant feedback loop** where brands can truly get a sense of what people are responding to, finding funny/interesting/bad/boring...

And as we start to leverage the power of creators in different ways, could we start to see these campaigns enter the comments or more pushes towards comment sections?

07

## CUSTOMERS ARE YOUR BIGGEST INFLUENCERS

TikTok has democratized content more than any other platform. Even a small creator can go viral with the right video that hits. British beauty brand, **REFY**, understands this, and in 2024 they pulled off an incredible sponsored influencer trip that was all over TikTok.

But the catch? They'd actually invited customers and followers NOT professional creators and influencers for an all-expense paid luxury trip to Mallorca. The response was fantastic with people praising the brand for giving their genuine customers such a great experience. Expect to see more customers as influencers in 2025!

08

## LONG-FORM, LATE 2000S YOUTUBE-STYLE TIKTOKS

As people seek out comforting, nostalgic content, we expect to see more of an appetite for longer, late 00s-style vlogger videos, but taking place on TikTok. The app has drastically increased the possible length of videos from its original 10 seconds, and this opens up more possibilities for branded creator content! Just still remember to **#MakeTikToksNotAds** e.g. don't put a glaring advert/logo in the first 5 seconds!!



# FINAL TAKEOUTS

So, in this rapid social-first world, what can we leave you with? Especially in knowing that something might happen tomorrow to change everything anyway (*after all, who could have ever predicted the events of 2020?*).

Well, the key to **Moving With The Mood Shift** is understanding that everything is always shifting, but for marketers to really respond, we need to sometimes look up, away from the data and the spreadsheets, and think about people and how they feel.

## 01 - LISTEN TO POP CULTURE PODCASTS MORE THAN MARKETING PODCASTS AND BE ON TIKTOK MORE THAN ON LINKEDIN.

*Don't get swept up in the marketing echo chamber, and don't become more interested in awards, innovations, strategy and tech than in actual human behaviors on social media.*

## 02 - AVOID THE CULTURAL ECHO CHAMBER, AND TALK TO YOUR FRIENDS AND COLLEAGUES ABOUT WHAT THEY SEE ON TIKTOK.

*If you work in social media, try to reset your TikTok algorithm every once in a while and actually speak to friends and colleagues about what they're seeing, why, and in what way.*

## 03 - PAY ATTENTION TO BIG RELEASES COMING NEXT YEAR.

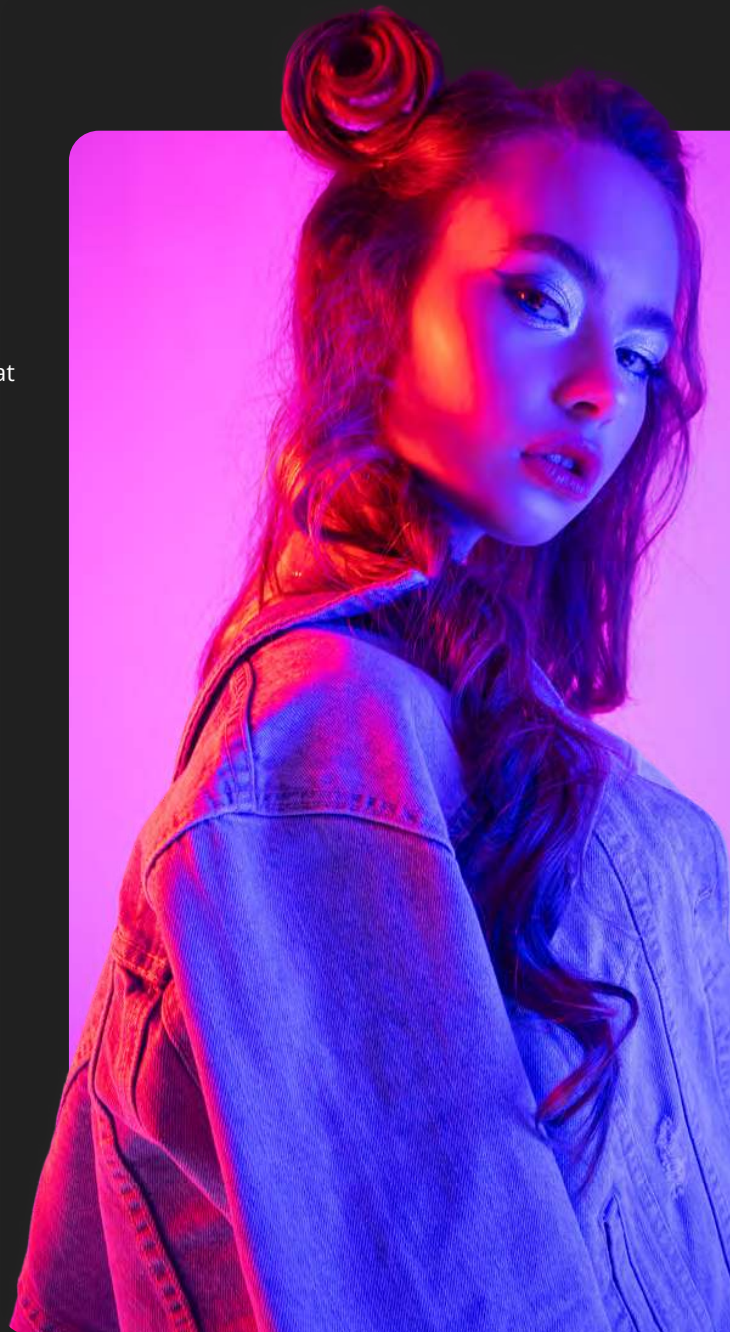
*As we've seen, pop culture drives trends and trends drive pop culture. If Taylor Swift releases her anticipated Reputation: Taylor's Version album in 2025, you can guarantee we'll see more TikTok trends inspired by winged eyeliner, dark lipstick and black clothing... So anticipate the big releases and have a plan for how you could respond.*

## 04 - CREATORS ARE THE TASTEMAKERS

*From product development to consumer research, brands are bringing creators in earlier and earlier in the process. Work more collaboratively with your creators and agencies to understand what's working, and be sure to follow the creators your customers follow!*

## 05 - HAVE A TEAM OR AGENCY THAT REFLECTS SUBCULTURES, AND ASK THEM!

*No one can possibly be across all trends, conversations, pop culture, at one time. But try to build a team (and tap into your agency team) that reflects different generations, demographics and interests. And make the time to talk! Not about data and insights, but about what's trending for them, what are they enjoying, and how are they and their friends feeling?*



## REMEMBER

No one has all the answers.

But our strength lies in **curiosity, listening,** and being **fast to respond.**

Think about how the trends your audiences are following and participating in could tell you something deeper, and keep an ear to the ground for mood shifts that could impact your strategy.

# WHO ARE THE GOAT AGENCY?

Goat is a global, award-winning social and influencer marketing agency.

Since 2015, we have been at the forefront of the social and influencer marketing industry, winning **Adweek's Fastest Growing Agency** in Europe in 2019, and being shortlisted for **Campaign's Global Social Media Agency of the Year** in 2023 and 2024.

Our team of experts has worked with hundreds of brands to drive awareness, engagement, conversions and brand love through long term creator-led strategies and best-in-class influencer campaigns.

We've worked with leading global brands such as **Alibaba, Dell, Heineken, Henkel, John Deere, L'Oreal, Mars Wrigley, NIVEA, Tesco, and Unilever**, helping them to build relevance amongst new audiences and scale their influencer marketing capabilities.

## GET IN TOUCH WITH US!

[www.goatagency.com](http://www.goatagency.com)

### We can help to:

- *Build brand relevance and advocacy through short and long-term influencer campaigns.*
- *Connect with new communities and customers through tactical creator-led activations.*
- *Consolidate your TikTok and wider social media / influencer marketing strategy across different platforms and territories.*
- *Help your brand to "Move With The Mood Shift", activate around trends, creators and communities, and ultimately become part of the cultural conversation.*

You can also subscribe to our weekly [Raised on Social](#) newsletter for all the latest insights, reports, events and creator news.

**Thank you for reading!**



goat

[www.goatagency.com](http://www.goatagency.com)

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