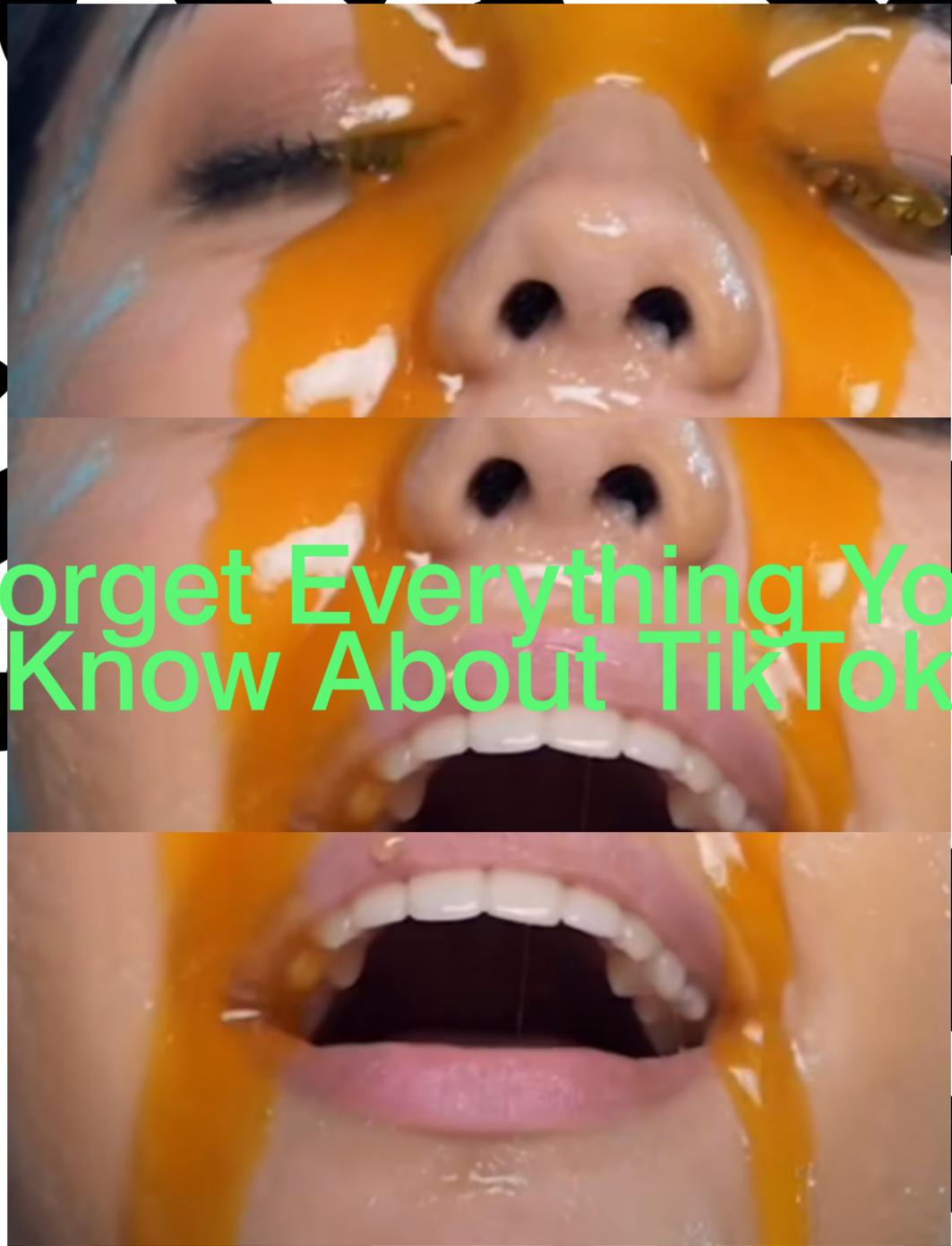
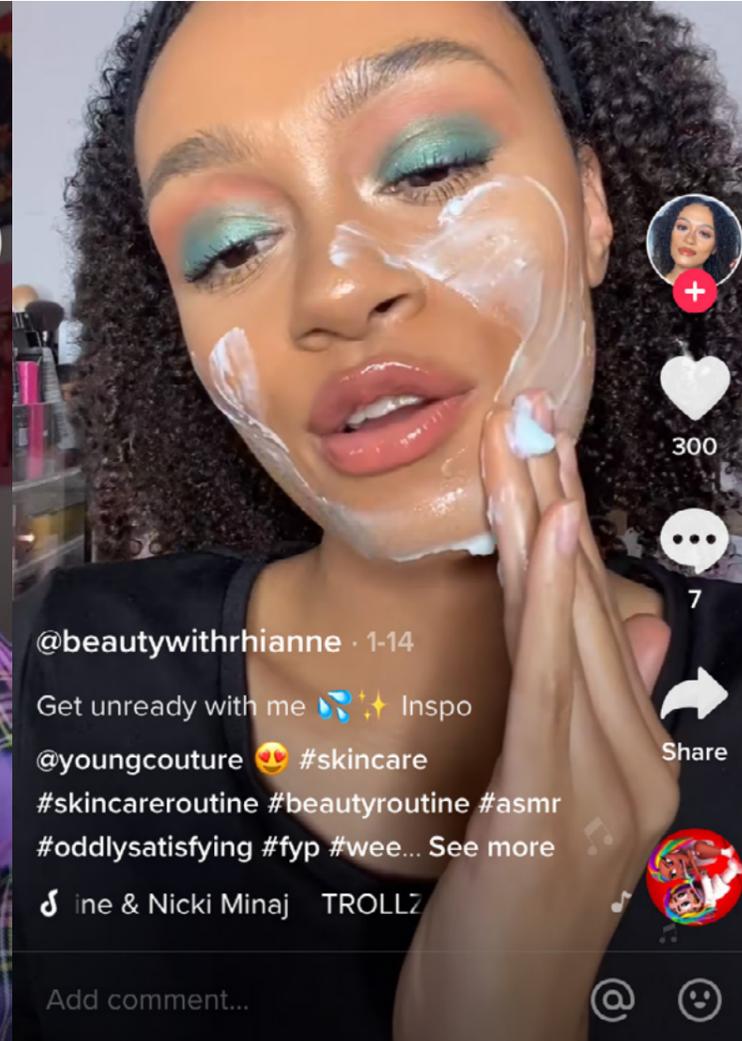


THIS IS CRAZY

This
Unlearn



Forget Everything You
Know About TikTok



This
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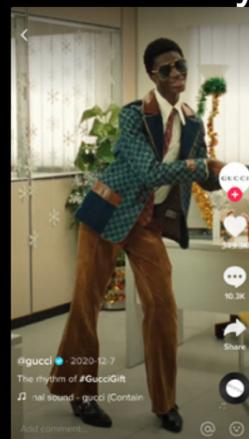
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FORGET EVERYTHING YOU KNOW ABOUT: TIKTOK

Not long ago, if you'd asked me what I thought of TikTok, I'd have replied with a somewhat arrogant response. "It's that app where kids do dance videos, you'd never catch me on it." I certainly wouldn't have been recommending it as a credible platform for brands, yet here I am writing the introduction to our report on the very subject.



I'm not afraid to admit when I'm wrong, and when it comes to TikTok, I couldn't have been further from the truth. I went from a TikTok denier to addicted within two hours of downloading the app, leaving Instagram neglected. Turns out I'm not the only one.

We discovered that 45% of people on TikTok aren't on Instagram at all, which offers a unique opportunity to tap into new audiences, and it's not just youth. From Gen-Z to the over 50s, the platform offers something to everyone.

Throughout this report, we spoke to some fascinating people, from social media experts, to niche TikTokers to creators with 7.3 million followers. We learnt that despite our differing experiences within the app, we're all equally invested for the exact same

reason – TikTok content surpasses the superficial, and in doing so, validates every part of ourselves, even the bits we aren't always comfortable with.

As someone that works in the brand space, this is where you need to pay attention. Your TikTok and mine are fundamentally different. My algorithm worked me out in just two hours, as did yours. It clocked that I had pets, that I'm a gay woman, that I have always wished I was more artistic, that I love TV shows with strong female leads, and that I have some deep rooted trauma that I try to avoid. It curated a feed of videos that cut through everything else on the internet and spoke to the most intimate parts of my life.



We all know that in advertising, it's the golden rule. Give them a solution to a practical problem, they might buy once. Give them a solution to an emotional problem, create a consumer that stays with you for a lifetime. It took TikTok two hours to find my emotional vulnerabilities, now all your brand has to do is sell me the solution.

Still think it's just an app for dancing kids?
by Livvy Moore, Head of Creative Production.

Bobby @bobbymoore44
7.3M followers

It all started when he placed a tea towel on his head to recreate relatable and humorous characters. 18-year-old Bobby shot to TikTok fame in 2020. Bobby has since amassed over 7 million followers and shows no sign of slowing down!

Bobby

Lex
Social Media Marketing Expert

Lex has worked client and agency-side in social media advertising for 10 years. It's fair to say he's well informed in all things social.

Lex

Naomi @nayyeohhhmeee
73.9k followers

London-based TikTok star Naomi, originally joined the platform to share videos of herself performing trending dance routines. But, after receiving racist comments, Naomi decided to use her following to educate people on what it means to be black in the UK in 2021.

Naomi

Rachel

Rachel
Director of Global Marketing
at Dickies

Rachel is responsible for leading global integrated marketing at Dickies, the world's leading performance workwear brand. She has built the Dickies social channels from the ground up, adapting and growing as the number of platforms rapidly increase.

B @nosebleedfiz
546.7k followers

B is a TikTok creator who is best known for her candid subversive humour. Her account, @nosebleedfiz is a peak into the consciousness of a 19 year olds' mind, from comedy to reaction videos. B uses TikTok to create lighthearted content with a deeper message, that being your authentic self is enough.

B

Giselle
Social Media Expert and Account
Director at Truffle Social

Giselle is a social strategist and expert in her field, working with brands such as H&M to cover everything within the social world, for all platforms from Clubhouse to TikTok.

Giselle

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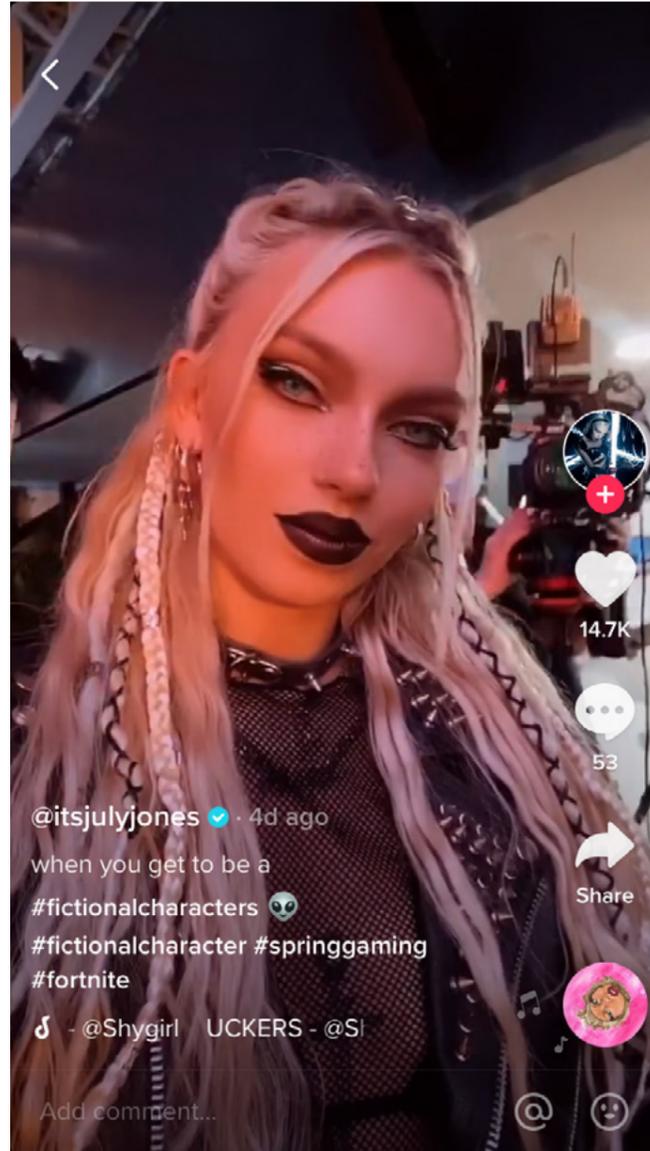
‘If you want your brand to be important to Gen Z, join Tik Tok.’

Rachel, Dickies

SECTION 1: THE PLATFORM

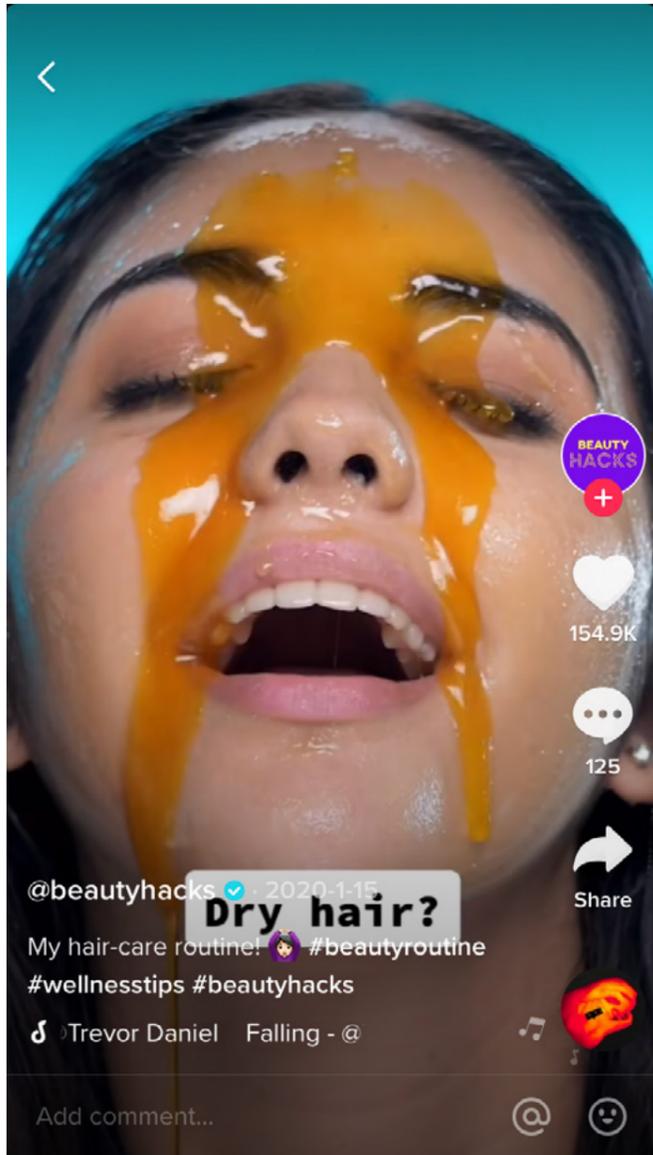
League of its own

TikTok has had a sharp rise to success. Since its 2018 merger with Musical.ly, now boasting over two billion downloads worldwide, TikTok's active users have overtaken Instagram and the app is quickly becoming the social platform of a generation. The social landscape has shifted as platforms like Twitch join the mainstream, and new platforms like Clubhouse gain popularity – we now have a whole new meaning to multichannel.



Move over Instagram

TikTok arrived as we reached peak influencer culture, a time when people were craving something new, something real. As video content became increasingly dynamic, Gen Z jumped on board to resurrect a Vine-like format in a new guise of cringe comedy, dance challenges and lip syncing. Just like Instagram came to kill Facebook, we can't help but wonder if TikTok will take the crown. But what's so different about it?



With unrivalled in-app editing features like filters and special effects – everyone's a creator.

TikTok is 15-60 second video-first content. Videos are tall, not square and you navigate by scrolling – not tapping or swiping.

The algorithm learns about you – serving you what you like & making assumptions about you from the second you open the app.

How it's unique & Why you should care

From new algorithms to limitless engagement possibilities, here's everything you need to know about TikTok's unique features and formats.

Huge audiences are in reach of all. You can go from zero followers to 100k without even liking another person's post – it's happened!

With the ability to duet and stitch your videos, the app optimises interaction levels and holds the ability to spark new trends or keep them alive.

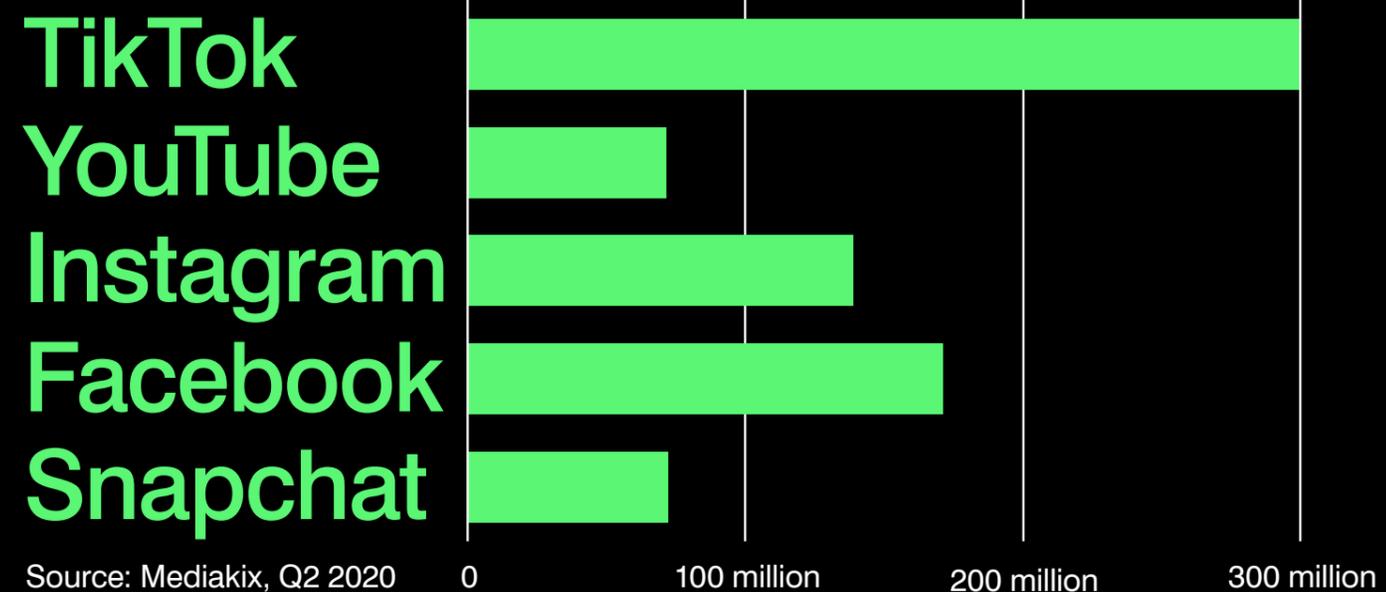
The app is designed to get you involved in repeatable formats, from challenges to trending effects or songs. You guessed it; anyone can find a way to be the centre of a trend.



How does it compare?

TikTok might be new, but it sure is mighty. To give you a view of the competitors, these statistics compare TikTok against older platforms in terms of downloads, daily time spent and average age.

Top mobile app downloads (global)



‘TikTok is the one place where anyone can blow up. Everyone's got the same opportunity.’

@bobbymoore44

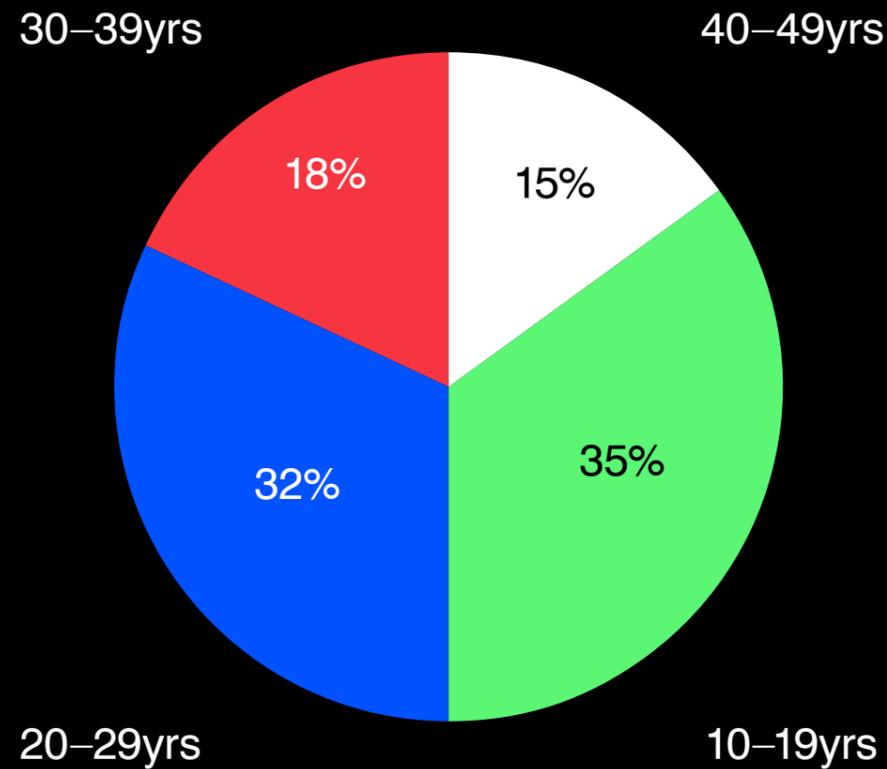
Average time spent on app per day (minutes)



% of users that share branded content and product recommendations



The percentage of U.S.-based TikTok users by age:



Source: Mediakix, 2020

Previously seen as a Gen Z platform, TikTok's audience age range is continuing to widen. 32% of users are between the ages of 20-29, with a strong purchasing power that brands seek out.

TikTok is coming for Netflix too

Average time spent per day (minutes)



'75% of users come to be entertained.'

Source: Internal TikTok Data, Oct 2020.

Source: EU Holiday Shopping Behavior Study 2020 (2) TikTok internal data (UK) + EMarketer 2020 media time spent UK

The power of TikTok — from politics to pasta

The power of TikTok doesn't just exist digitally, it actively translates to the outside world. From switching the outcomes of political rallies, to sold out ice cream – TikTok users have real potential to make substantial change.

YING & SUPPLYING ▾ STORES ▾ CHANNELS ▾ FINANCE ▾ PEOPLE ▾ REPORTS ▾ EVENTS

Mochi TikTok craze sees Little Moons sales rocket 700% at Tesco

REFINERY29 DISCOVER ▾ WATCH ▾ SHOP ▾ + MO

Is Feta Cheese Really Selling Out Thanks To This Viral TikTok Pasta Dish?

RollingStone

Menu

Read Next RS Country Music Picks for the Week of March 15th

HOME > MUSIC > MUSIC FEATURES

JUNE 11, 2020 12:47PM ET

Want a TikTok Hit? Have \$30,000?

As TikTok's user-base has ballooned, the cost of promoting music on the app has skyrocketed

By ELIAS LEIGHT



Election Results: Biden Wins Electoral College Votes Congress Defies Mob Georgia Runoff Results Democrats Win

TikTok Teens and K-Pop Stans Say They Sank Trump Rally

EXPLORE InStyle

HOME > BEAUTY > SKIN

52,000 People Bought This \$7 Anti-Aging Serum Because of a TikTok Video

THE TIMES

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TikTokers send self-help book for 'bitches' into charts after 20 years

Two decades on, a book exhorting women to stop being doormats has hit the bestseller lists again

Liam Kelly, Arts Correspondent

Sunday February 07 2021, 12.01am, The Sunday Times



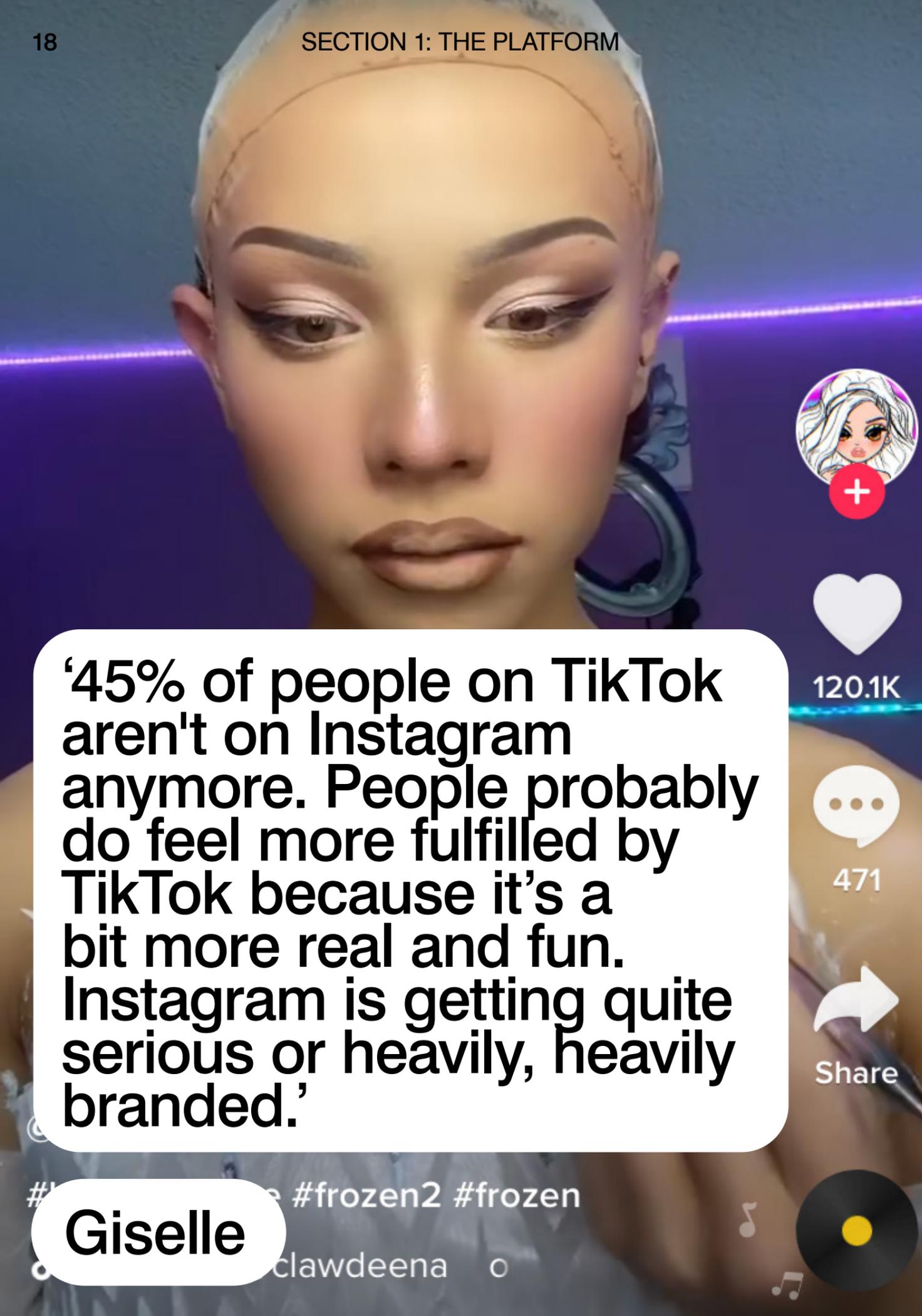
Forbes

EDITORS' PICK | Jun 11, 2020, 07:00am EDT | 6,513 views

Could Dalgona Coffee Become More Than Just A TikTok Trend?

reviewed by our editorial team. If you





'45% of people on TikTok aren't on Instagram anymore. People probably do feel more fulfilled by TikTok because it's a bit more real and fun. Instagram is getting quite serious or heavily, heavily branded.'

Giselle

Who's better? Instagram vs TikTok

These two platforms are undoubtedly two of the biggest, but despite their similar popularity, they offer users completely different experiences.

Instagram ↔ TikTok

1.2 billion monthly active users

3.85% average engagement rate for a micro influencer

Millennial

High quality aesthetically driven content

Consume content from those you follow

Difficult to edit in app

Algorithm prioritises content with highest engagement

Shoppable & commercially focused

1 billion monthly active users

17.95% average engagement rate for a micro influencer

Gen Z

low-fi content, focused on meaning

Consume content from people you DON'T follow

Easy in-app editing

Algorithm prioritises content it thinks you'll like

Built to entertain

Highest engagement rate on a platform

Curated content

Easy to shop in

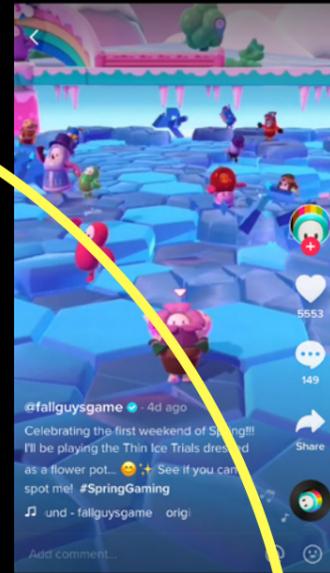
The YT for social

Influence & Cultural Currency

New
Most of the top 40 TikTok stars, (mostly Gen Z) with followers in the tens of millions, are not “celebrities” – in fact, the majority found fame through the platform when it was released.

More Level
Influence and cultural currency don't behave the way we've come to expect from traditional media – where the wealthy, connected and privileged are often the most rewarded. TikTok levels this playing field with their unique algorithm.

Playing Field
It's not just mainstream TikTok content that gets all the attention, the various subcultures and niche communities on the platform are often preferred by users.



Forget everything you know about...

Social / Entertainment

Entertainment
TikTok breaks the traditional medium of a social platform, as it's entertainment-focused with a UI centred around immersion versus engagement.

Takes Over
Users expect to be entertained and uplifted on TikTok, in comparison to Snapchat or Facebook which are used to find out what your friends or family are up to.

Social
Instagram is known as the main social hub, but it's rapidly moving to areas of inspiration and shopping, more akin to Pinterest.

Algorithms

Formats
The algorithm is secret, but we know it uses ML to make hyper-personalised recommendations, compared to other platforms that go by what you're already following and liking – the TikTok algorithm does this automatically.

Constantly
Algorithmically unique, it carefully fills your For You Page with a mix of popular videos, relatively niche or random content and unexpected selections you might like.

Updating
This all works to keep the feeling of freshness and discovery at a high.

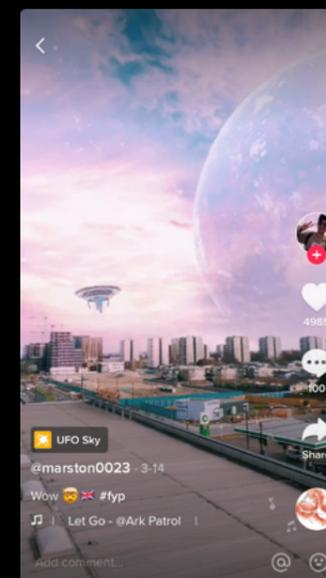


Followers

Breaking
Building audiences and following your friends are not a priority on TikTok.

The Quest
TikTok success is measured by views, not how many followers you have – millions of followers doesn't mean your content goes far.

For Followers
You must keep your content hyper-relevant to keep up with competition and everchanging trends.



Key Takeaways

1

TikTok breaks the traditional medium of social platforms and exists in the entertainment space.

2

Gen Z crave real and relatable content instead of curated aesthetics. TikTok taps into this with creative, low-fi content.

3

TikTok's audience is rapidly growing and becoming a place for all ages. Importantly, ages 20-29 equate to 32% of users and these are the ones with strong purchasing power.

4

TikTok users emphasise content over "influencers." Everyone has an equal chance of success.

5

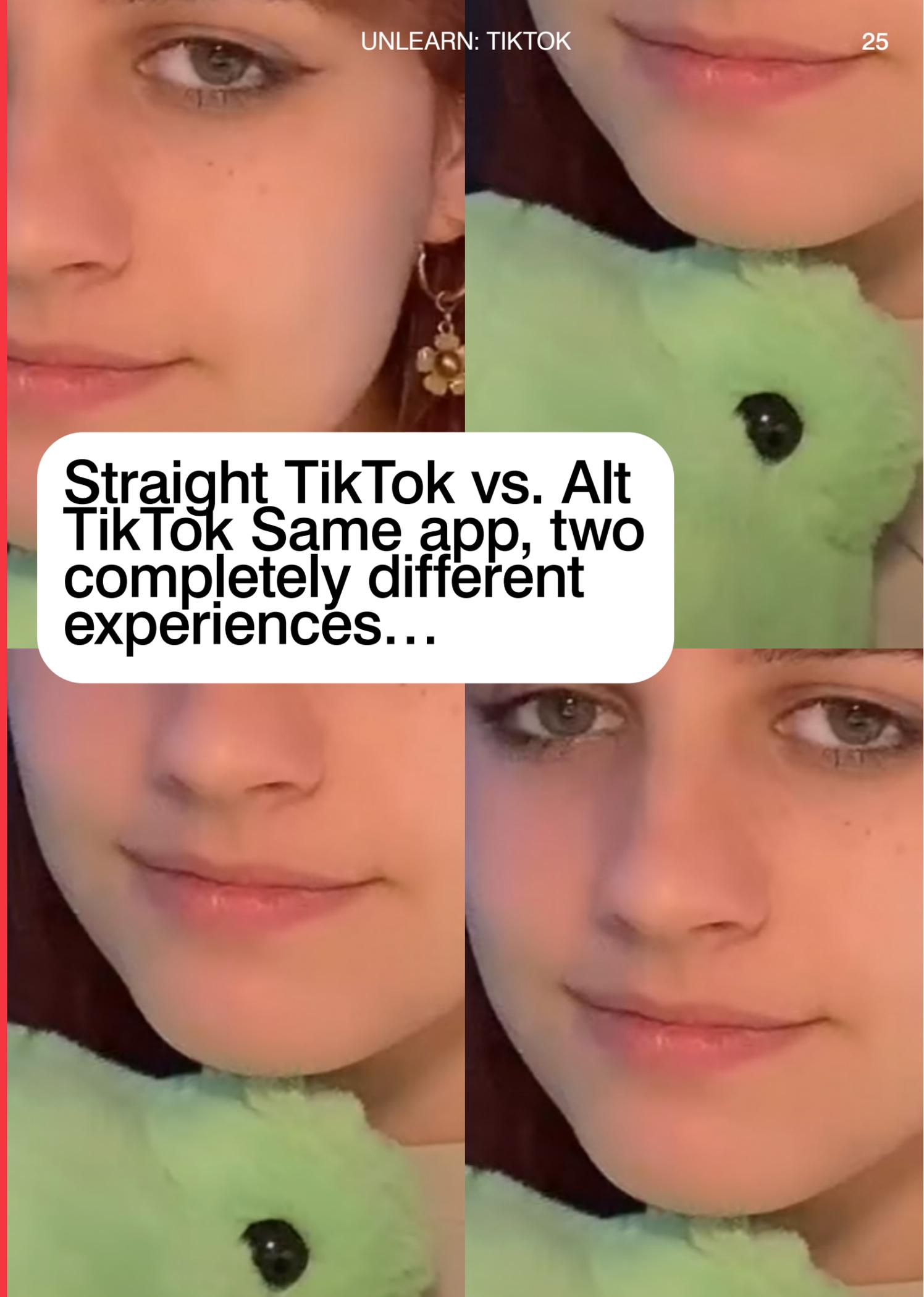
TikTok influences digitally and physically – if a product goes viral on TikTok, it's going to sell out in real life.



This
There

**Straight TikTok vs. Alt
TikTok Same app, two
completely different
experiences...**

SECTION 2: CULTURE AND SUBCULTURES



TikTok cultures reflect who we are

Like all social platforms, TikTok holds a mirror up to society. This mirror reflects the mainstream and subcultures, also known as “Straight TikTok” and “Alt TikTok.” Straight TikTok is the mainstream home to TikTok staples – dance challenges and lip-syncing – and the big content creators that have been there from the beginning.

Whereas Alt TikTok is everything that is “othered” from StraightTok. It’s a space that provides a feeling of community for many, allowing them to express themselves and find their niche.

These two worlds don’t often collide – if you follow Alt TikTok, then the dance challenges on Straight TikTok often won’t cross over.

Typically if you fall into one camp, you simply won’t see the other. This creates an echo chamber. Echo chambers have always existed in society – when you mix technology and powerful algorithms how do you determine community from chamber?

‘Is it TikTok’s fault? Or users watching? The TikTok algorithm just reflects what society is. I don’t see it as TikTok pushing anything.’ Bobby

@bobbymoore44

‘The algorithm is just discrimination...it’s pretty privilege. It’s elitist and doesn’t favour queer people, Black people, Indigenous people and people of colour.’ B

@nosebleeditz

What do we think?

Evolution of echo chambers and ethics of Algorithms
By Livvy Moore, Head of Creative Production

On the plus side, Alt TikTok feels like an evolution of the echo chamber, as it’s providing more representation and voice to those who have previously been marginalised. But this isn’t the whole picture, and with algorithms it rarely is. What appears to be representative is not, and ultimately you’re being fed what you want to see.

This personalisation has the opportunity to make us feel less alone, with other freaks and outcasts just like us who laugh at obscure jokes about witches or talk openly about trauma. This is powerful stuff as it’s appealing to our most inner niches.

But is it ethical? What happens when someone’s inner prejudices are reflected as the norm? Streams of content with not a single person of colour or targeted content of Incel ideology and radicalisation. Is it still as amazing as we think just because we’re laughing?



DIY Easter Egg

@tamaracnorr · 4-4



‘There are two very different sides to TikTok. Straight TikTok scares me a little bit. The typical Straight TikTok videos are just people dancing, almost like ‘look at me, I’m pretty’ which is fine. I enjoy both.’ Naomi [@nayyeohhhmee](#)

Straight TikTok

Sometimes labelled as “boring,” but we’re not here to take sides - let’s just call it mainstream TikTok.

WHAT DOES YOUR FOR YOU PAGE LOOK LIKE? Dance challenges, lip syncing and POVs.

IN-GROUP LEADERS
Charli D’Amelio, Addison Rae and Hype House crew.

WHAT GIVES YOU CLOUT?
Comedy, dancing, cute content, brands and possessions.

Alt TikTok

Home to the more “edgy” content that doesn’t live on StraightTok. Also known as Queer or Elite TikTok.

WHAT DOES YOUR FOR YOU PAGE LOOK LIKE? Inside jokes made at StraightTok’s expense and anything from Gremlincore to Beans TikTok.

IN-GROUP LEADERS
[@froggirocros](#)
[@nosebleedfitz](#)
[@sylvaniandrama](#)

WHAT GIVES YOU CLOUT?
Advocating for communities, pretending to be the official account of Walmart and turning StraightTok dances into pure chaos.

Subculture timeline. Where could your brand fit?

Normally Straight TikTok is where you'll start on the platform, but make your way to Alt TikTok and you'll find the rejection of mainstream trends in favour of surreal humour and alternative aesthetics. The grey zone reflects similar formats, but you won't see the same content in terms of tone, vibe and humour. Here's the subcultures you can expect.

Hyper nice

Alt TikTok

Grey Zone

Straight TikTok

Maintstream



Dance Challenges
Very mainstream dances which are paired with songs that start trending and then get copied by users on the platform. Check out @justmaiko



POVs (format)
Users reveal and share short stories through POV storytelling. Check out @elenaghen



Music / Lipsync Challenges
Lip syncing to audio, usually a conversation or a song, to tell a story, or express a feeling. Check out @gvnnbll



Witch-Tok
The Witchtok subculture focuses on self-care, astrology, wellness and magic. Check out @theemuses



Hobby-based Content
(e.g. craft, DIY, skate, fashion) Content that inspires others to create and try something new. Check out @steeze365daily



Anedoctal comedy (sharing experiences into camera)
Using real life events to evoke relatable comedy. Check out @mattisnotreal

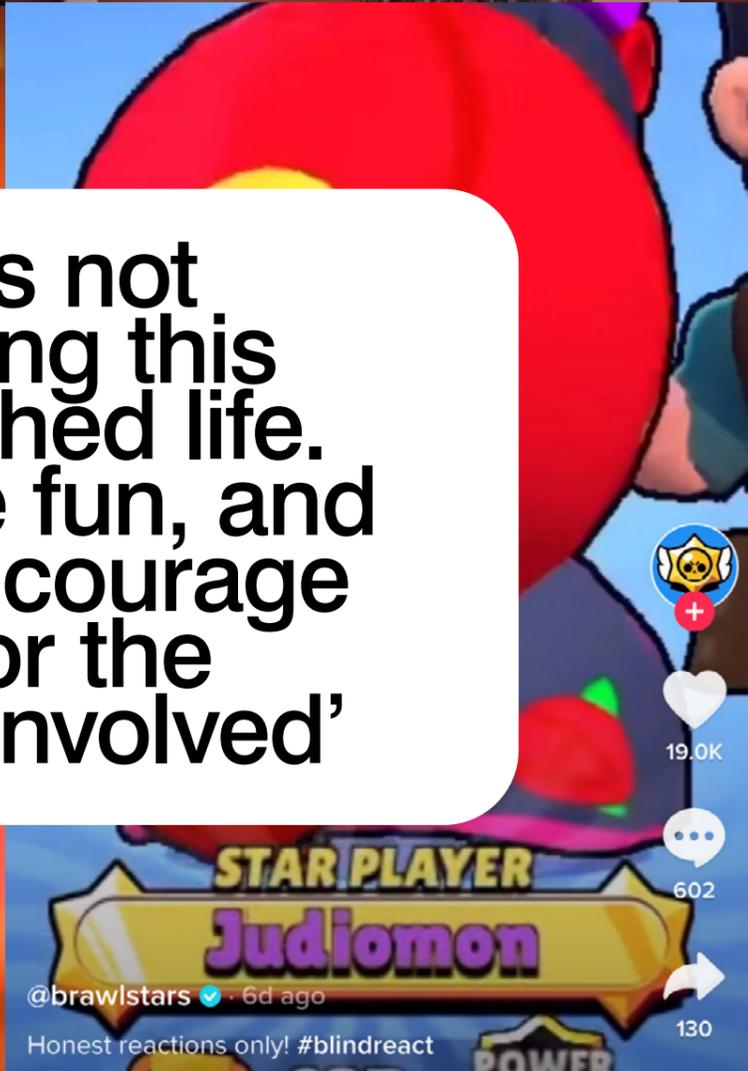
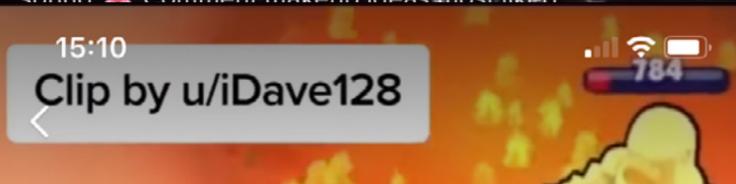
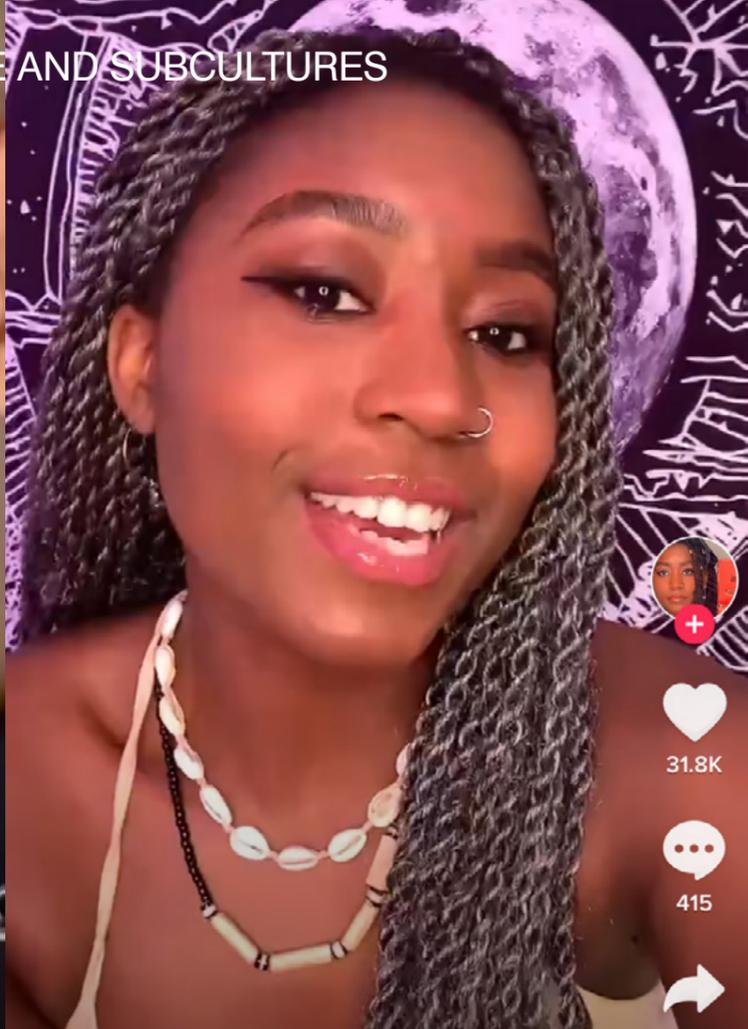


Toxic TikTok
From content on how to hack into people's phones to social media stalking tips. Check out @emmacaitlinlews



Dark academia
This subculture revolves around literary classics. Check out @cosyfaerie

Other relevant accounts
@sylvaniandrama
@mothology
@lyssacurrent
@froggielcros
@electronicant78



‘With TikTok, it’s not all about showing this perfect or polished life. It’s meant to be fun, and it’s meant to encourage you to get up for the challenge, get involved’

Giselle

Key Takeaways

1

StraightTok is great for reaching the mainstream with new trends and challenges almost everyday.

2

Alt Tok is the place to find hyper-engaged niche communities to connect with.

3

Is your brand more aligned with Straight or Alt TikTok? Know this before creating content to craft a successful TikTok strategy – think about who would be truly invested in your brand, product and story.

4

Infiltrate subcultures by making relevant organic content and move beyond adverts to show you understand communities.

5

Understand how influence works – your talent strategy needs to differ depending on whether you are looking for reach or engagement.

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SECTION 3: BRANDS



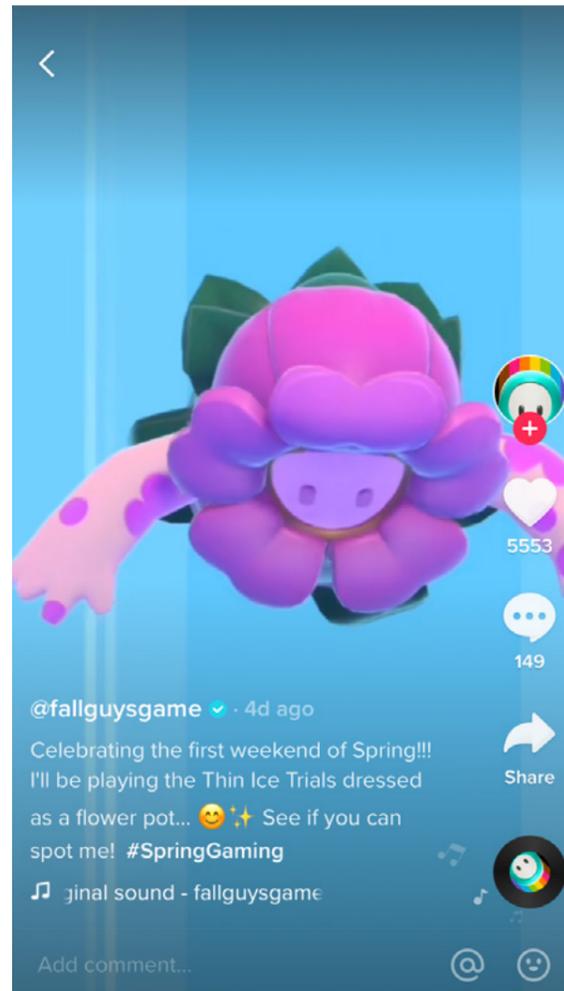
Does your channel strategy need an update?

‘Brands tend to work with TikTok to get a branded hashtag challenge for a day, but the best challenges are never planned for’ Lex

The social landscape for brands has slowly shifted over the past few years, and TikTok has only accelerated the need for brands to update their channel strategies.

But, TikTok is by no means the only platform to focus on. Having an effective presence on several platforms is key to connecting with different audiences – you just need a different approach and strategy for each.

But for now, we focus on what you can actually do on TikTok and share some stand-out examples of when brands have nailed their approach to TikTok campaigns...



A new form of advertising

There are several ways to advertise on TikTok, but it's important to know what they cost. As a brand, you need to consider ROI when choosing the right options for you.

Branded hashtags

Create a hashtag and a challenge to a song and set of specific dance moves – 35% of users have participated in one!

In-feed ads

5-15 second promoted in-feed TikTok videos that link out to a landing page and give you 100% SOV on screen.

Branded songs

Brands are achieving visibility by working with musicians to release their own songs or song challenge.

Takeover Ads

A 3-5 second video, image or GIF that pops up when you first open TikTok and uses an external link away from the landing page.

Branded Lenses

With 64% of users trying face filters and lenses, brands have been quick to create their own 2D or 3D shareable versions.

Talent Partnerships

Talent partnerships for one-off campaigns or longer term creator partnerships can be successful for brands.

But not everyone is listening

While many brands have seen great returns through TikTok's advertising packages, our creators told us the app is actively avoiding ads...

'Ads don't perform as well as regular content – people on TikTok aren't really there for that.'

@nayyeohhhmeeee

'Sometimes you can be on a video for a good 3 seconds before you realise, I've caught myself watching it and enjoying it, and I'm like, 'Oh, it's an advert. Never mind.'

@nosebleedfitz

Successful brands move beyond advertising

TikTok × Fashion Week 2020

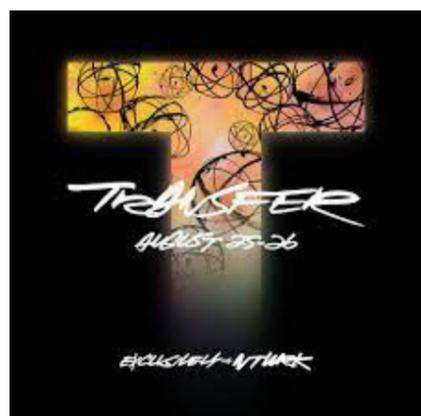
As a global lockdown forced fashion powerhouses to get creative, we saw catwalks head from the runway to TikTok. In Sept 2020, TikTok hosted a month-long fashion event with livestreamed fashion shows by the likes of YSL, Louis Vuitton and JW Anderson who debuted their women's spring/summer collections.

TikTok's immersive capabilities show that the the options for new innovative uses on the platform are endless.

NTWRK'S TRANSFER virtual festival

A two-day virtual festival, celebrating culture and design with over 30 brands and creatives involved in a mix of interviews, music performances and DJ sets. NTWRK's TRANSFER festival held the first ever live show on TikTok – selling a limited edition fashion collection aimed at hitting that Gen Z audience.

Moving beyond creativity, this displays TikTok's power to turn viewers into active shoppers – creating a whole new realm of social commerce.



TikTok × UEFA EURO 2020

TikTok has been announced as the global sponsor of UEFA EURO 2020 – marking the first time a social platform has sponsored a major national tournament. TikTok will be home to all UEFA-inspired creator content with AR effects, hashtag challenges, BTS reactions and celebrations.

TikTok has truly cemented itself as the social platform for entertainment. From FROW to Football.

Become the brand that's noticed

Step 1 Take the time to invest in a TikTok strategy

- 1 Invest the time in creating a clear strategy.
- 2 Consider what your brand can bring to the TikTok table.
- 3 Form a plan for where your brand fits on the straight/alt spectrum, who your audience are and what content they like.

Step 3 Turn your brand into a trending subculture

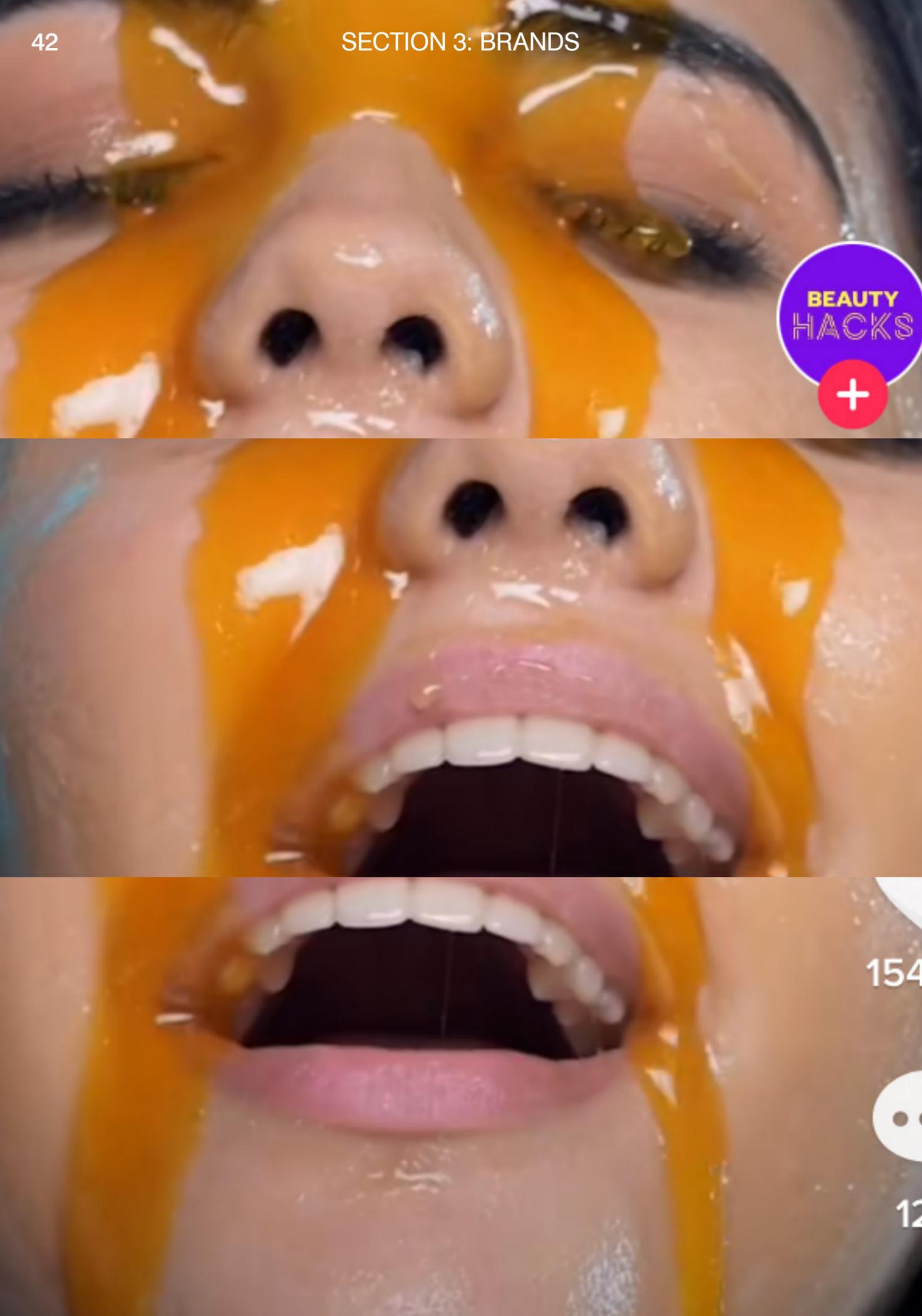
- 1 Create your own lane – dedicate time to creating repeatable organic content that is 100% your brand.
- 2 Don't obsess over trends, just tap into the trends that are right for you.
- 3 Remember, you have as much chance of success as anyone else on the platform!



Step 2 Create a collaborator Program

- 1 Identify the communities you want to be part of.
- 2 Assemble relevant content Creators who are experienced in that niche.
- 3 Task the Creators to generate content – they'll create output you would never even think of!





Insider tips and tricks



The basics

Use hashtags – they are more effective on TikTok than Instagram. Users heavily rely on hashtags to teach the algorithm what they like.

React to trends in the first 2 days – any later and you'll have missed it. But don't worry, there'll be another one very soon.

Centre your on-screen text placement to gain favour with the algorithm.

Post consistently – 3x a day is optimum.

Use trending songs to get extra algorithmic love.

Bonus Tip

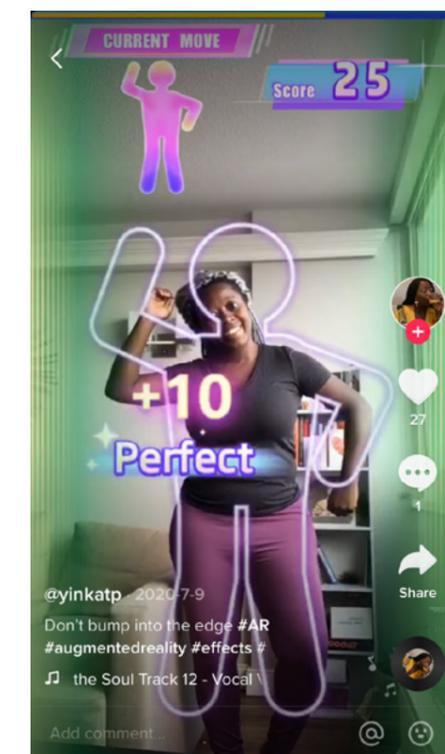
Completion rate over 100% = algorithm take over

The hack to increase engagement

Talk to camera and say 'You' within 5 seconds.

The hack to increase completion

Chat with people in the comments. The video will play in the background while people chat.



Key Takeaways

1

Create a clear channel strategy for the platform – set your objectives, KPIS and plan for success.

2

Find your community on TikTok – does your brand fit with Alt or Straight? Or does it crossover?

3

Make your own Creator Programme – having your community create relevant content for your brand is one of the most powerful ways to get started.

4

Lean in to being responsive and fluid – join in challenges, use hashtags, use trending songs – but always be true to your brand.

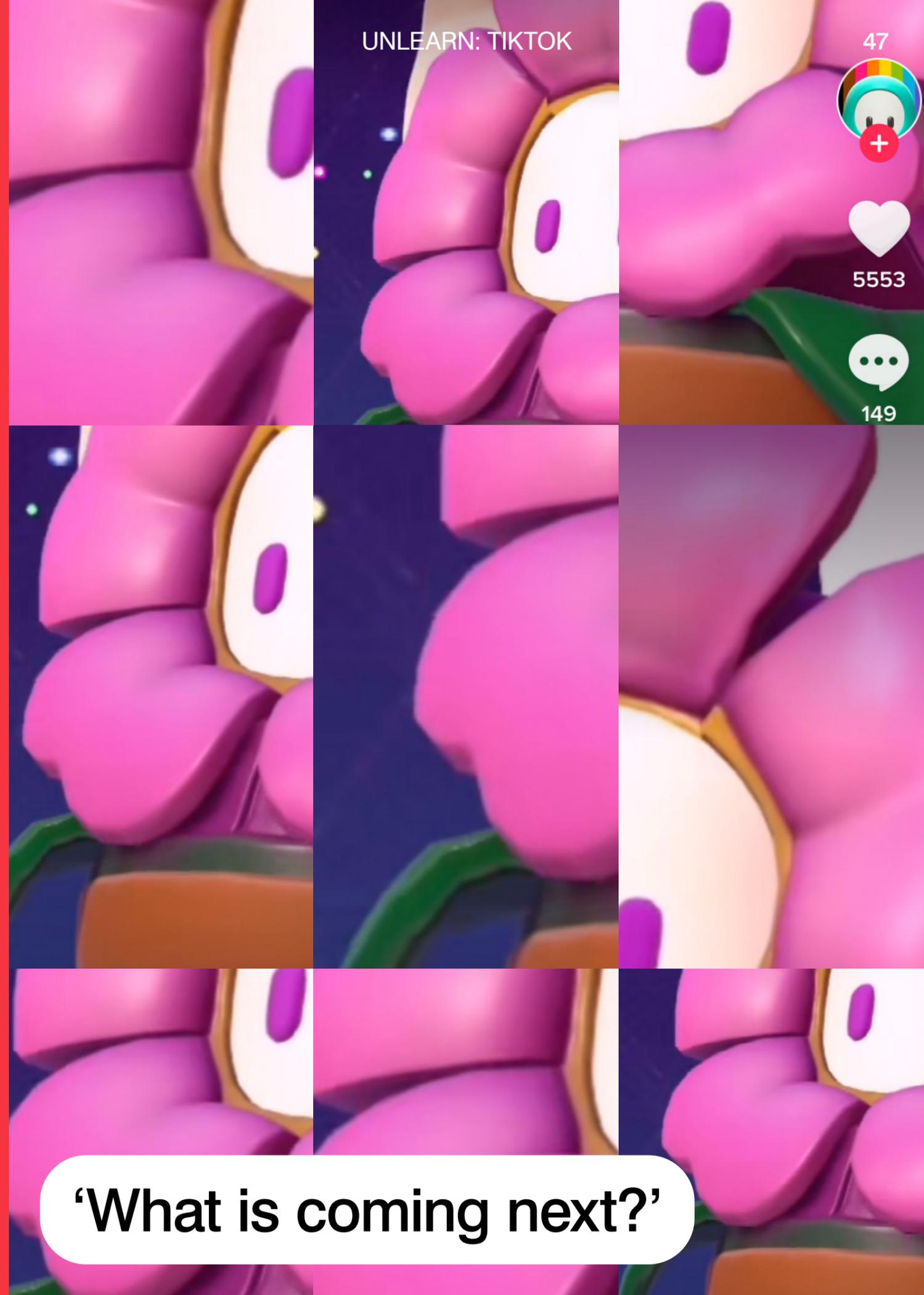
5

Monitor, report, test and learn what works for your brand. But most importantly, don't forget to have fun.

‘When we have new channels, the most important thing to remember is not to copy and paste. Try to figure out what that platform is for, and then plan around it. For example, with Clubhouse, it’s not about fun, silly content to engage – it’s about meaningful conversations.’

@bobbymoore44

This
There



SECTION 4: THE FUTURE

‘What is coming next?’



What is coming next

There's a constant stream of new platforms you can tap into – stay ahead of what's coming next, find out what audiences are using them and if it could be a platform for your brand. Think beyond the obvious and you could see amazing results.



TikTok's new in-app innovation:

TikTok celebrates its #learnonTikTok community of teachers, scientists, make up artists and beyond by partnering with Quizlet, to provide another way for creators and learners to explore topics and ideas.

Working on developing its augmented reality features to offer more immersive experiences.

Making it even easier for creators to sell merchandise in-app

New platforms gaining traction:

Byte

Byte is a new TikTok rival from a Vine co-founder. Similarly, a video app for creative communities.

Tangi

Tangi created by Google is the latest short-form social video sharing app

Kuaishou+ Kwai

In Asia, Kuaishou is gaining popularity, and its sister app, Kwai, is popular in Brazil.

Triller

Co-owner and movie producer, Ryan Kavanaugh, markets Triller as the 'adult version' of TikTok.

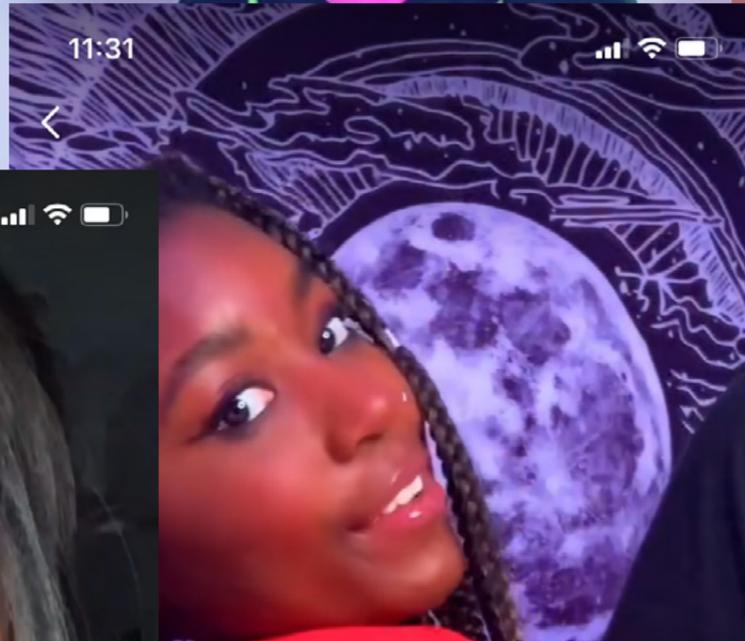
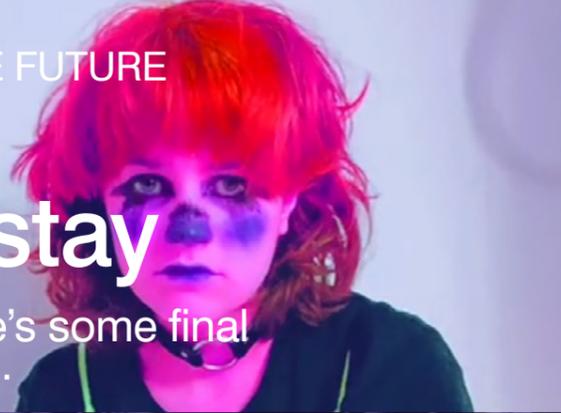
Old platforms trying to catch up:

Facebook + Instagram

Facebook and Instagram will look to close in on TikTok this year with increased investment in Reels (15-second videos) and new features.

TikTok is here to stay

If you need any more convincing, here's some final words from our creators and experts...



Bobby

'You can't go on YouTube or Instagram and blow up anymore. Until another platform comes around the corner, TikTok is staying.'

'Facebook is the new Myspace. Instagram is the new Facebook. It's all evolving – my nieces are not on Instagram, they're on TikTok.'

Rachel

Naomi

'I think Instagram will die off eventually because they don't care about their creators at all. Whereas, TikTok has shown they really care about theirs.'

'It's quite scary the way they're growing. TikTok will go in the same direction as the internet. There will be everything on TikTok.'

B

Lex

'TikTok is going to become powerful by having so much content on there. And they're also building a social commerce platform within for brands to take part. They make it easy for brands.'

'In the future, TikTok will definitely be the most widely used platform with an extensive age range. It has such a young market that the other platforms don't have, and they're already tapping into the 35-plus.'

Giselle

THIS HERE

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We're a creative agency that puts real people at the heart of our work. We craft our narratives from life, because authentic stories have the power to make people believe in brands – not just buy them.

We create impactful, memorable moments through creative collaborations. Working on behalf of some of the biggest brands in the world, we enable local relevance on a global scale.

Our London based team is small but mighty. We invest in the people and partners that have the intelligence, intuition and integrity to move global culture forward. One brand project at a time.

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