we
are.
social

Think
Forward

2020
2020

The new rules of social

We connect people and brands in
a meaningful way. That's why
Think Forward 2020 unpicks the complex
and ever shifting web of consumer
behaviour online, and explores the role
brands can play in reflecting and shaping it.

Historically, the internet has been exempt
from the rules and restrictions of the physical
world. But this year, the Wild West got a
little less wild. Instagram hiding public likes,
clampdowns on #ads, the Fyre Festival
fallout; these shifts in the digital landscape
are evidence of a new set of rules being
enforced by users, creators, platforms
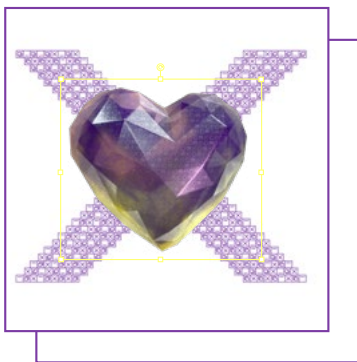and authorities. In 2020, brands will
need to walk the line.

Think ♡
Forward

1

Added Value
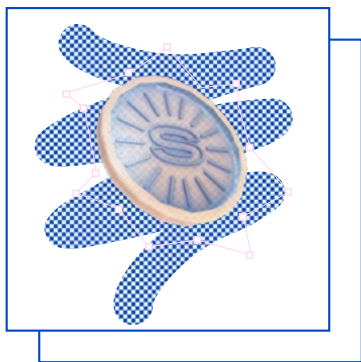
People are placing higher value on digital content and creators

2

Social Self-Care

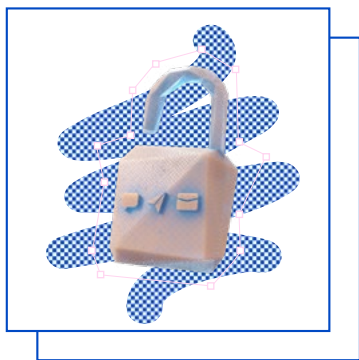People are seeking a healthier relationship with their digital consumption

3

Bad Influence

There's a growing backlash against influencer culture and the metrics that drive it
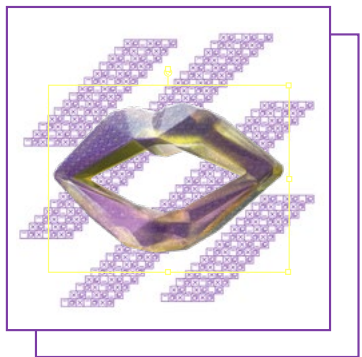
4

Overt Privacy

Intimate digital spaces are gaining favour over public ones
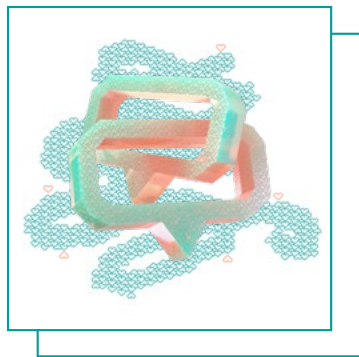
5
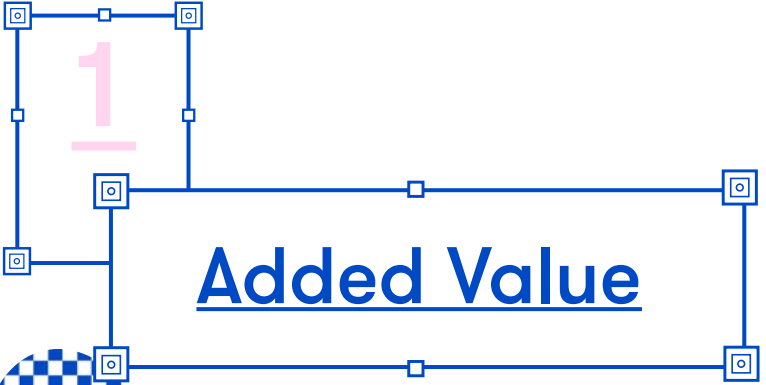
Running Commentary

People are engaging with longer, more complex narratives on social

6

Cultural Crossfit

There's a mass merging of cultures, categories, verticals and genres

1

Added Value

The cultural shift

People are placing more value on digital content and creators

The internet has long been a wild west where intellectual property is barely there. But in a maturing digital frontier, creators have grown dedicated audiences who not only see value in their content, but recognise their style anywhere. As a result, communities are rallying to protect creators. Brands must credit properly or risk trial by social committee.

1 Added Value

The behavioural change

1 People are paying
> their favourite creators
for content

2 People are boycotting
> career plagiarists

3 People are calling
> out brands that
don't credit

The behavioural change

1

>

**People are paying
their favourite creators
for content**

Despite the wealth of free
content online, people
are using platforms like
Venmo and Patreon to pay
creators for extra content.

j
@jurosee

Follow

how much y'all gonna pay me to be on my
close friends list

9:28 PM - 1 Dec 2018

6 Likes

TECHNOLOGY

'Close Friends,' for a Monthly Fee

Influencer culture has normalized charging money for all kinds of intimacy.

KAITLYN TIFFANY   SEP 17, 2019

1 Added
Value

The behavioural change

People are boycotting career plagiarists

2019 saw the hashtag #fuckfuckjerry flourish, which encourages people to unfollow @fuckjerry, who profits almost exclusively off stolen posts.

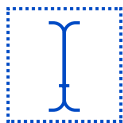# The behavioural change

3
>

People are calling out brands that don't credit

In a call-out culture, any brand that doesn't abide by this shift will see themselves immediately repremanded online.

Rebecca Reid ✔
@RebeccaCNReid

Hmm. Daily Mail are trying to pretend that they're allowed to use photos taken from people's social media. I think we all know that's not true...

2018 saw 3 million people pay creators on Patreon – a 50% year-on-year increase

Patreon, 2019

Added Value

How to use it

1
> ## Brands should champion the audience as well as the creators

#SephoraSquad – the influencer programme for beauty brand Sephora – doesn't recruit its influencers based on their number of followers, but on audience loyalty. Anyone can apply as long as their followers vouch for them.

How to use it

2
>
Brands should ensure they're being respectful of online communities

When The North Face took images of people wearing its clothing at famous landmarks, and uploaded them to their Wikipedia pages as if they were legitimate creators in this space, people were outraged that a brand would be so disrespectful of the Wikipedia community.

1 Added Value

2

Social Self-Care

The cultural shift

People are seeking a healthier relationship with their digital consumption

Social was once a space for projecting and seeking validation. But in the wake of increased mental health awareness, people are taking a more measured approach to digital consumption. They don't want to be cut off from the internet. They just want a better relationship with it. So consumers are actively rebalancing their digital lives to protect their wellbeing.

2 Social Self-Care

The behavioural change

1 > **People are seeking out online optimism**

2 > **People are forming support networks around relatable memes**

3 > **People are consulting with digital therapists**

The behavioural change

1
> **People are seeking out online optimism**

In the face of feelings of inadequacy and anxiety, overt positivity is the new counterculture. Dancer Donté Colley, for example, has risen to fame on Instagram for his motivational messaging.

The behavioural change

2
>   **People are forming support networks around relatable memes**

College meme groups, like 'UC Berkeley Memes for Edgy Teens' are spaces where US college students can find solace in relatable memes around common anxieties.
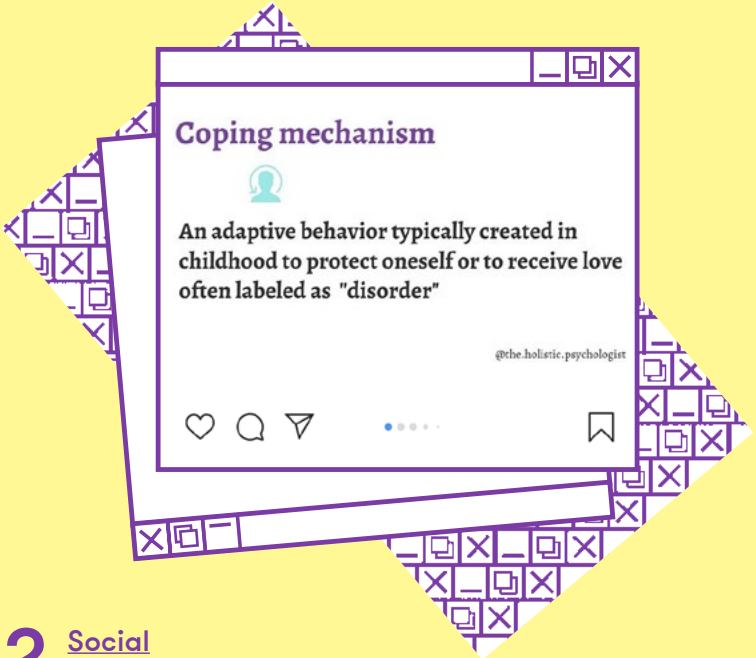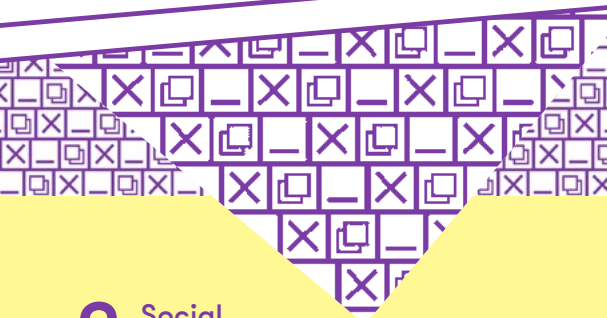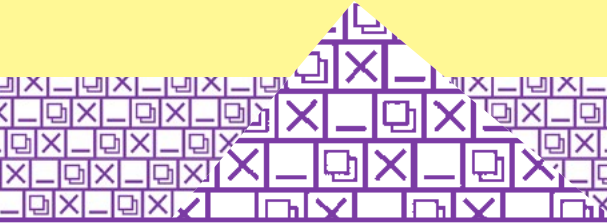

"How's studying for finals going?"

2   Social Self-Care

The behavioural change

3
>
**People are consulting
with digital therapists**

Instagram-based therapist
Dr. Nicole LePera has a
1 million-strong following that
can message her directly or
just engage with her content
to get a hit of healthy advice.

Coping mechanism

An adaptive behavior typically created in
childhood to protect oneself or to receive love
often labeled as "disorder"

@the.holistic.psychologist

2 Social
Self-Care

Google searches for the term 'self care' have risen 100% in the past five years

Google, 2019

How to use it

1 **Brands should create content that supports people's emotional health**

> Uber partnered with meditation app Calm to repurpose the short journeys people take in its vehicles as moments to better their health. They created four guided meditations that enable people to use their journey to free up some mental space.

2 Social Self-Care

How to use it

2
> **Brands should support people in enforcing healthier habits**

Vodafone, in a counterintuitive movement, created #ScreenFreeFathersDay to encourage dads, with the help of dad influencers, to put their phones down to better connect with their kids IRL.

3

Bad Influence

The cultural shift

There's a growing backlash against influencer culture and the metrics that drive it

Influencers used to be beacons of authenticity, but being a content creator born on social media has lost its lo-fi sheen; lifestyle influencers lead increasingly un-relatable lives, while Will Smith is spearheading a new wave of celebrity 'creators' on platforms like YouTube. As a result, there's a growing backlash against influencer culture and the metrics that drive it.
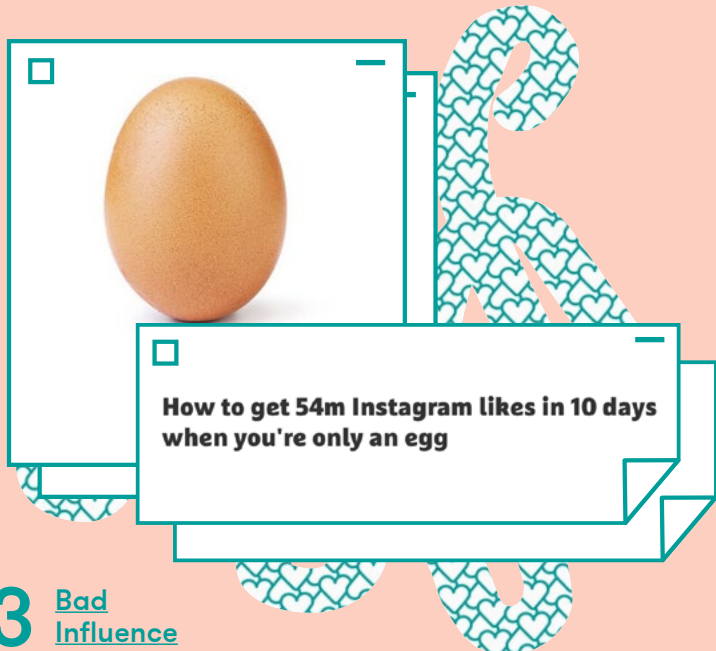
3 Bad Influence

The behavioural change

1
> **People are refusing to participate in online social hierarchies**

2
> **People are making fun of influencers**

3
> **People are engaging with celebrities as creators, and vice versa**

The behavioural change

1

>

**People are refusing
to participate in online
social hierarchies**

@world_record_egg is part
of a wider uptick in 'shitposting';
a phenomenon that sees
people refuse to participate
in established online social
hierarchies.

How to get 54m Instagram likes in 10 days
when you're only an egg

3 Bad
Influence

The behavioural change

2 > People are making fun of influencers

A growing body of online content exists primarily to poke fun at the vacuous nature of influencer culture. Recently, a boy turned up to VidCon dressed up as an apology video, for example.
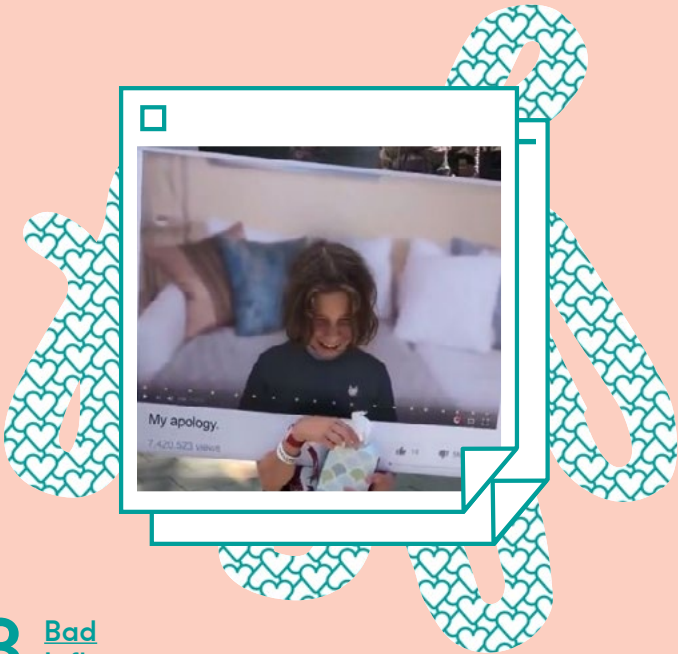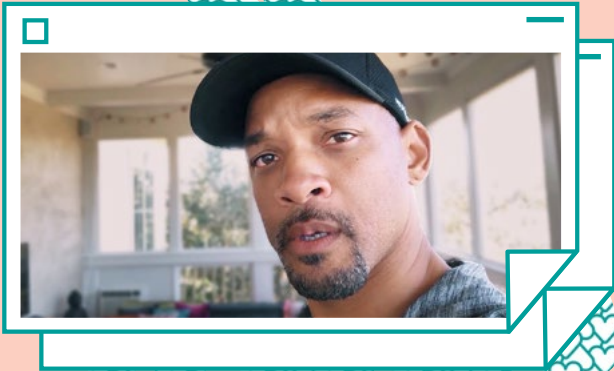

My apology.

7,420,523 views

3 Bad Influence

The behavioural change

3 > **People are engaging with celebrities as creators, and vice versa**

The lines between influencer and celebrity are blurring. YouTuber PewDiePie's wedding was covered by traditional gossip mags, while Will Smith is killing it on YouTube by behaving like a grassroots creator.

3 Bad
Influence

Influencer relatability is twice as important as popularity when it comes to product endorsements

Edelman Trust Barometer, 2019

How to use it

1
>   **Brands should move
from influencer marketing
to community marketing**

Focus on the strength of the bond
between the influencer and their
audience, rather than the message
itself. Brands should look to validate
the power of the community prior
to working with any influencer,
ultimately focusing on quality
of relationships over quantity.
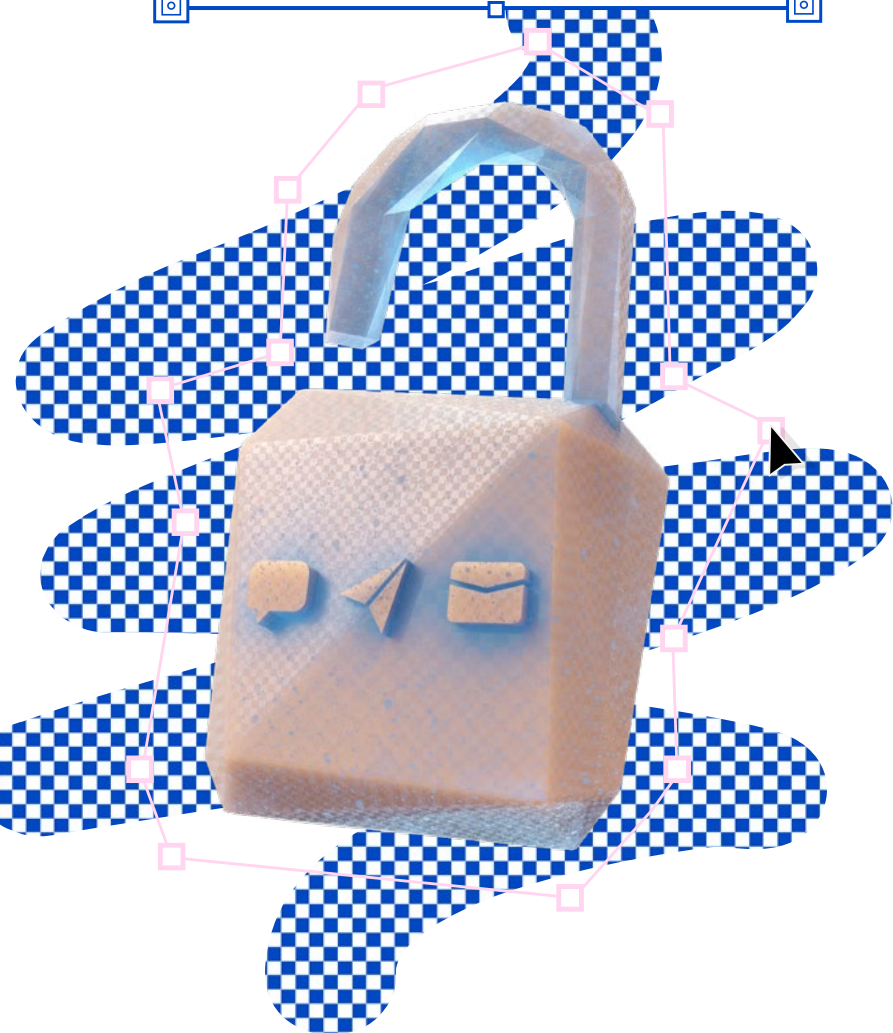
3   Bad
Influence

How to use it

2

>

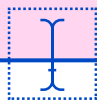### Brands should subvert influencer tropes to generate impact

Kahlúa created an IRL anti-influence exhibition of Instagram photos that got zero likes in New York, as well as developing a digital tool called #BottomNine, which let people find – and repost – their nine least-liked photos on Instagram.

3 Bad Influence

4

Overt Privacy
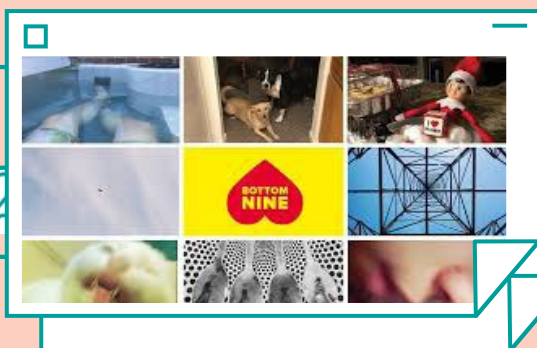
The cultural shift

Intimate digital spaces are gaining favour over public ones

People are sick of feeling surveilled. They're taking control of their digital footprints, ultimately looking to hide from brands, platforms, and even their outer circles, by moving into more intimate social spaces. With tools like Instagram 'Close Friends' and Facebook Groups gaining traction, the public feed feels less important than ever.
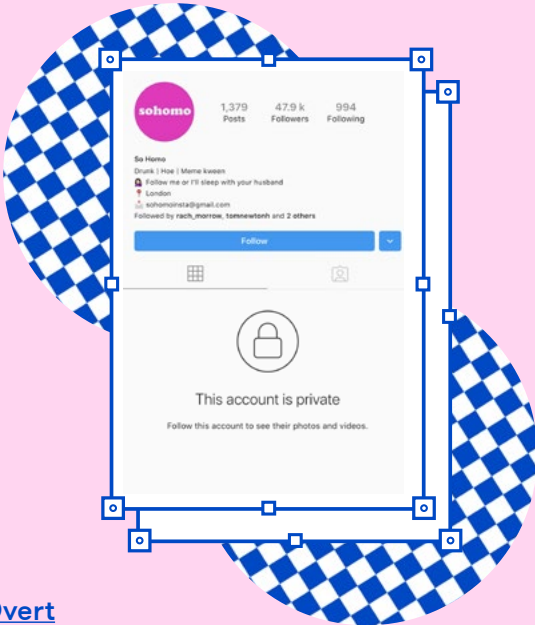
4 Overt
Privacy

The behavioural change

1
> People are locking down their accounts

2
> People are using closed communities as digital safe spaces

3
> People are subverting their language to game algorithms

Overt Privacy

The behavioural change

1
>
People are locking down their accounts

Many people – including large meme accounts – have started to lock down their social channels, ultimately taking control of who gets to see and respond to what they're posting.

The behavioural change

2
>

People are using closed communities as safe spaces

NdFlex is a closed Facebook Group for people in France to debate the flexibilisation of the labour market (a controversial topic), without the fear of trolls going unchecked.
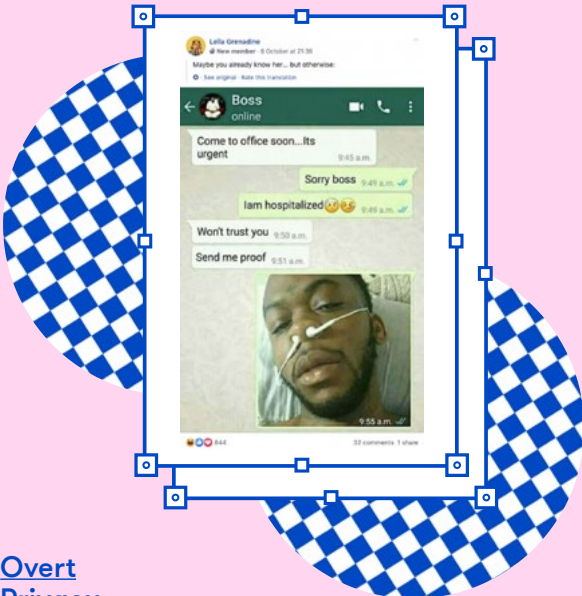
The behavioural change

3

>

People are subverting their language to game algorithms

People are using ornate synonyms for well-known websites, products and people to prevent retargeting against keywords (otherwise known as 'voldemorting') and minimising their reach.

WIRED

GRETCHEN MCCULLEN   IDEAS   10.09.2018 04:38 PM

Welcome to Voldemorting, the Ultimate SEO Dis
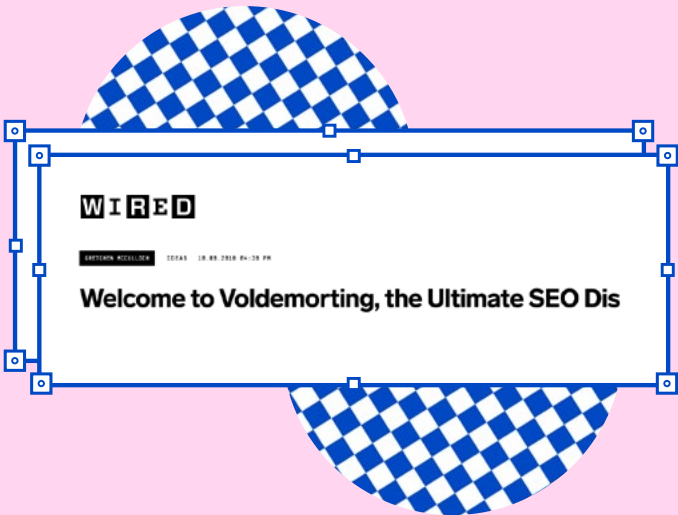
The future is private

Mark Zuckerberg, 2019
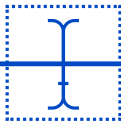
How to use it

1

Brands should ask for permission to play

> The Telegraph has introduced a Brexit WhatsApp Group for masochists who haven't had their fill of Brexit news. Users have to opt in and consent to receiving less formal notifications from the newspaper.

🏠 › News

Sign up to the Telegraph's WhatsApp groups

4 Overt Privacy

How to use it

2
> **Brands should harness this behaviour to talk to customers**

Starbucks is exploring how it can use private groups to better engage with consumers around product development. Parts of its audience are invited in, then made part of innovation testing.
In these closed spaces, people are highly engaged and give honest, unfiltered feedback.

4 Overt
Privacy

5
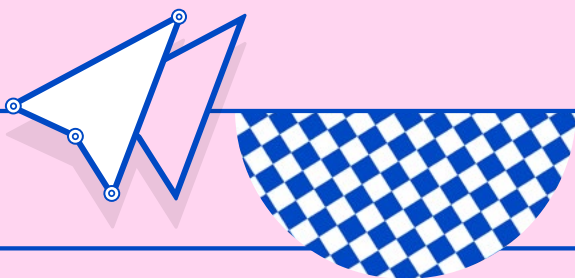
Running Commentary
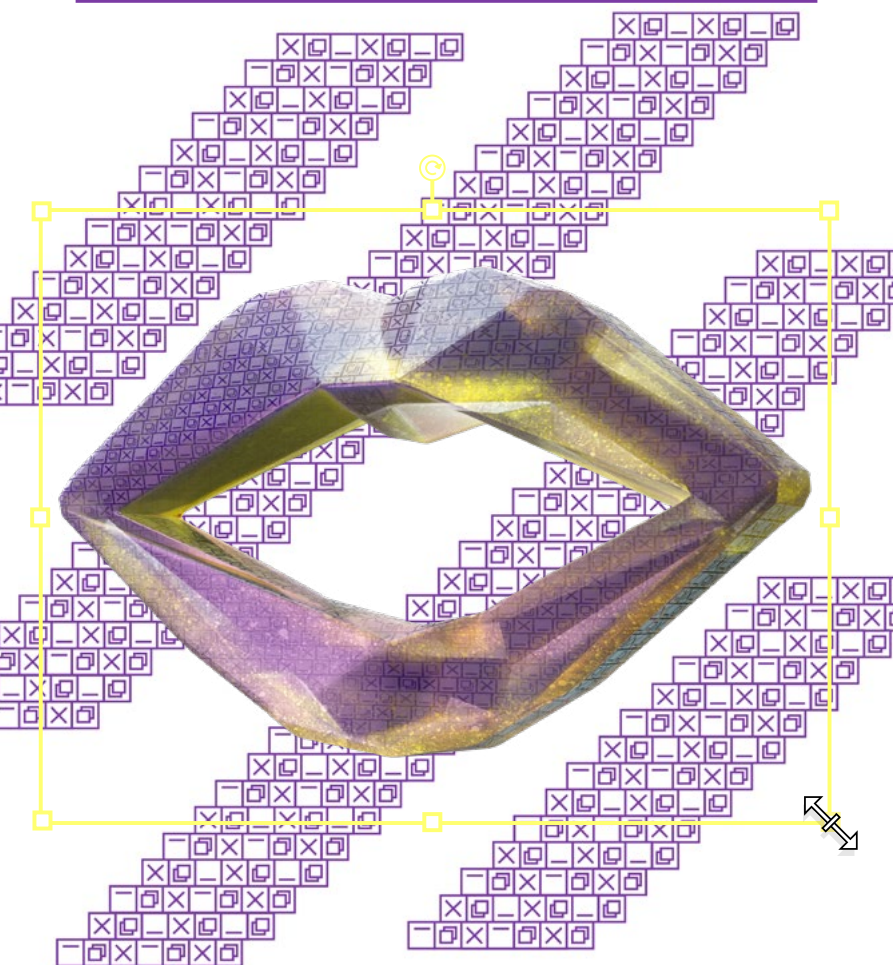
The cultural shift

People are engaging with longer, more complex narratives on social

It's long been accepted wisdom that people are put off by lengthy content online.
But social content is no longer all about brevity. In a maturing digital landscape, content and narratives across platforms are growing longer and more complex, with audiences more willing to invest time and attention in stories they deem to have a higher value.

5 Running Commentary

The behavioural change

1 > **People are engaging with long-form captions on Instagram**

2 > **People are indulging in the soap-opera-ficiation of social**

3 > **People are interacting with Twitter threads**

The behavioural change

People are engaging with long-form captions on Instagram

On a platform that has historically been tied to the notion that aesthetics matter above all else, people like internet personality Caroline Calloway are finding fame through long-form captions.

The Captionfluencers

Instagram, known for photos that inspire envy and ire, has also become home to those who write their hearts out.

The behavioural change

2
>

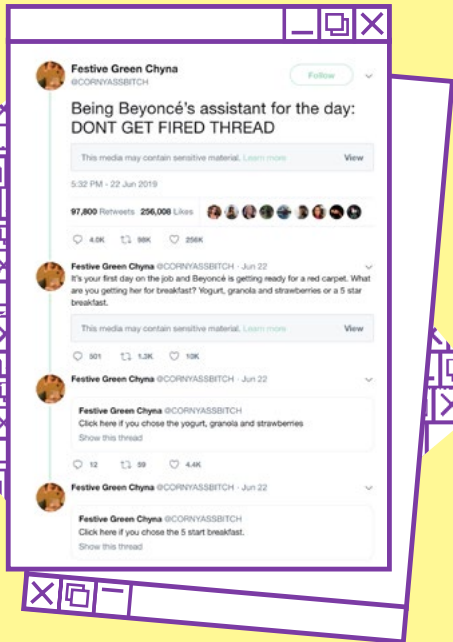**People are indulging in the soap-opera-ficiation of social**

Cross-platform digital feuds – like the one between YouTube make-up artists James Charles and Tati Westbrook – have become a well-documented facet of tabloid news.
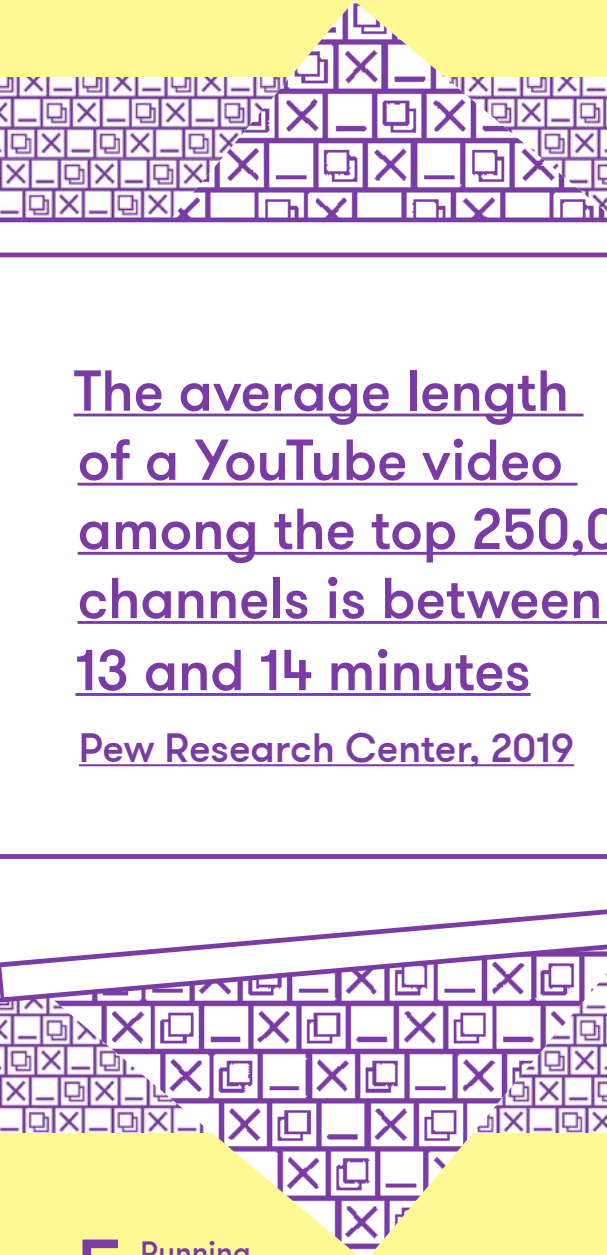

FEUDS | UPDATED MAY 17, 2019

Everything to Know About the James Charles vs. Tati Westbrook Feud

5 Running Commentary

The behavioural change

3
>
People are interacting with Twitter threads

Twitter was once founded on the idea that less is more. But today, not only are tweets twice as long as when they were conceived, but some of the best in-platform moments are playing out in threads.

Festive Green Chyna
@CORNYASSBITCH

Follow

Being Beyoncé's assistant for the day:
DONT GET FIRED THREAD

This media may contain sensitive material. Learn more   View

5:32 PM · 22 Jun 2019

97,800 Retweets 256,008 Likes

4.6K   98K   256K

Festive Green Chyna @CORNYASSBITCH · Jun 22
It's your first day on the job and Beyoncé is getting ready for a red carpet. What are you getting her for breakfast? Yogurt, granola and strawberries or a 5 star breakfast.

This media may contain sensitive material. Learn more   View

501   1.3K   10K

Festive Green Chyna @CORNYASSBITCH · Jun 22

Festive Green Chyna @CORNYASSBITCH
Click here if you chose the yogurt, granola and strawberries
Show this thread

12   59   4.4K

Festive Green Chyna @CORNYASSBITCH · Jun 22

Festive Green Chyna @CORNYASSBITCH
Click here if you chose the 5 start breakfast.
Show this thread

The average length of a YouTube video among the top 250,000 channels is between 13 and 14 minutes

Pew Research Center, 2019

How to use it

1
⌐ **Brands should play a more active role on social**

There's been a renaissance in community management. When Lionesses launched their World Cup #BeReady campaign, for example – announcing the squad on a Twitter thread with well-known contributors – the team showed that thinking long-form on a short-form platform could be a success.

How to use it

2
>
Brands should let people tell their story on social

The most interesting stories on social are the ones that are told from multiple perspectives, maximising reach but also adding nuance and intrigue, encouraging users to do a little digging to see the full picture. It's why HBO show Euphoria encouraged its cast to take their own photos on-set to share as they pleased.

Cultural Crossfit
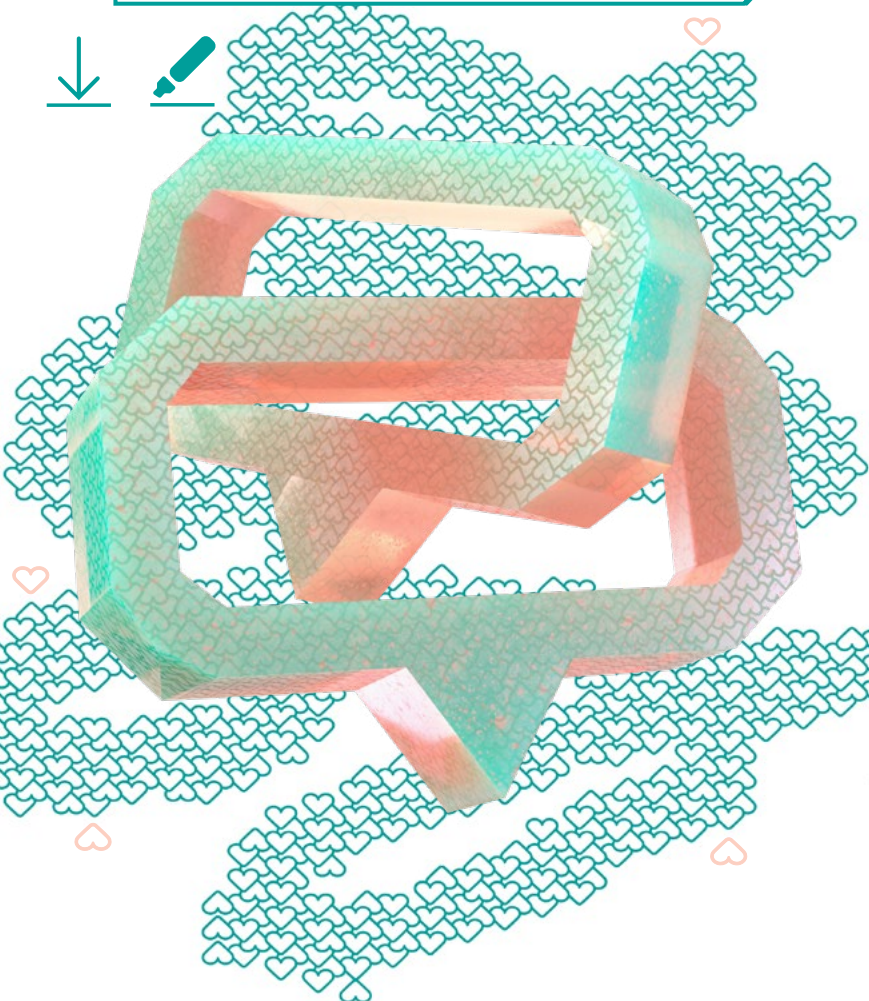
The cultural shift

There's a mass merging of cultures, categories, verticals and genres

People have often been forced to engage with cultural interests in isolation, but that doesn't reflect the way they consume. Tastes are flexible and multifaceted. People don't just love fashion or only watch TV, after all. But driven by openness to collaboration among brands and platforms, cultural convergence is more far reaching than ever.

6 Cultural Crossfit

The behavioural change

1 > **People are merging cultural references to reflect their individuality**

2 > **People are engaging with multiple cultures simultaneously**

3 > **People are engaging with IRL interests in immersive digital worlds**

The behavioural change

1
>

People are merging cultural references to reflect their individuality

Newness can be found at the intersection of multiple ideas, interests or genres. 'Old Town Road' by Lil Nas X – a fusion of hip hop and country – was arguably the most successful song of 2019.

6 Cultural Crossfit

The behavioural change

People are engaging with multiple cultures simultaneously

Digital natives have grown up exposed to multiple cultures at once; it's partly why meme account @yugnat999 is so popular. Its Frenglish memes are a commentary on contemporary language.
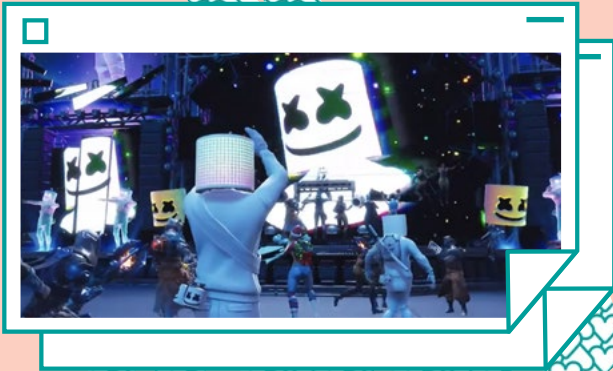

When I'm forcé to listen to tes bullshits

The behavioural change

3
>
People are engaging with IRL interests in immersive digital worlds

Fortnite is arguably one of the most interesting online spaces, due to its in-game events –
DJ Marshmello's digital concert drew 10 million in-game fans.

'Old Town Road' by Lil Nas X was #1 on the Billboard Hot 100 for 19 weeks

Billboard, 2019

6 Cultural Crossfit

How to use it

1
> **Brands should be adaptive and culture-first**

Marketers used to think in silos, whether in category – music, sports, films, video games – or distribution – social platforms, OOH, digital. But channels have broadened and blurred, while entertainment categories have merged. Brands need to be more agile and be willing to cross multiple cultures effortlessly.

How to use it

2 > **Brand should target specific communities to maximise cultural impact**

Brands with broad audiences can tap into niche communities more effectively by targeting multiple identity markers. Netflix knows that the majority of its users like TV and movies, for example, but its @Prism Instagram handle targets LGBTQ+ TV and movie lovers to maximise its relevance.
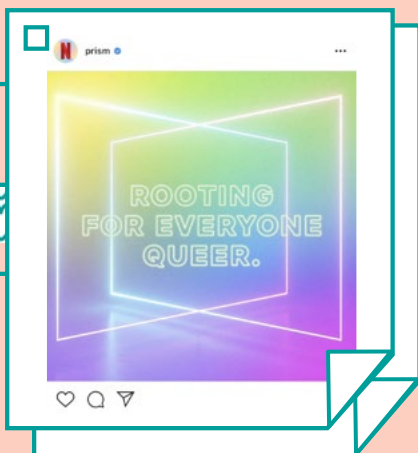
+44 (0) 20 3195 1700

**We Are Social
Alphabeta, 14–18
Finsbury Square
London EC2A 1AH**

talktous@wearesocial.net

wearesocial.co/uk

>

Think ♥

♥ Forward