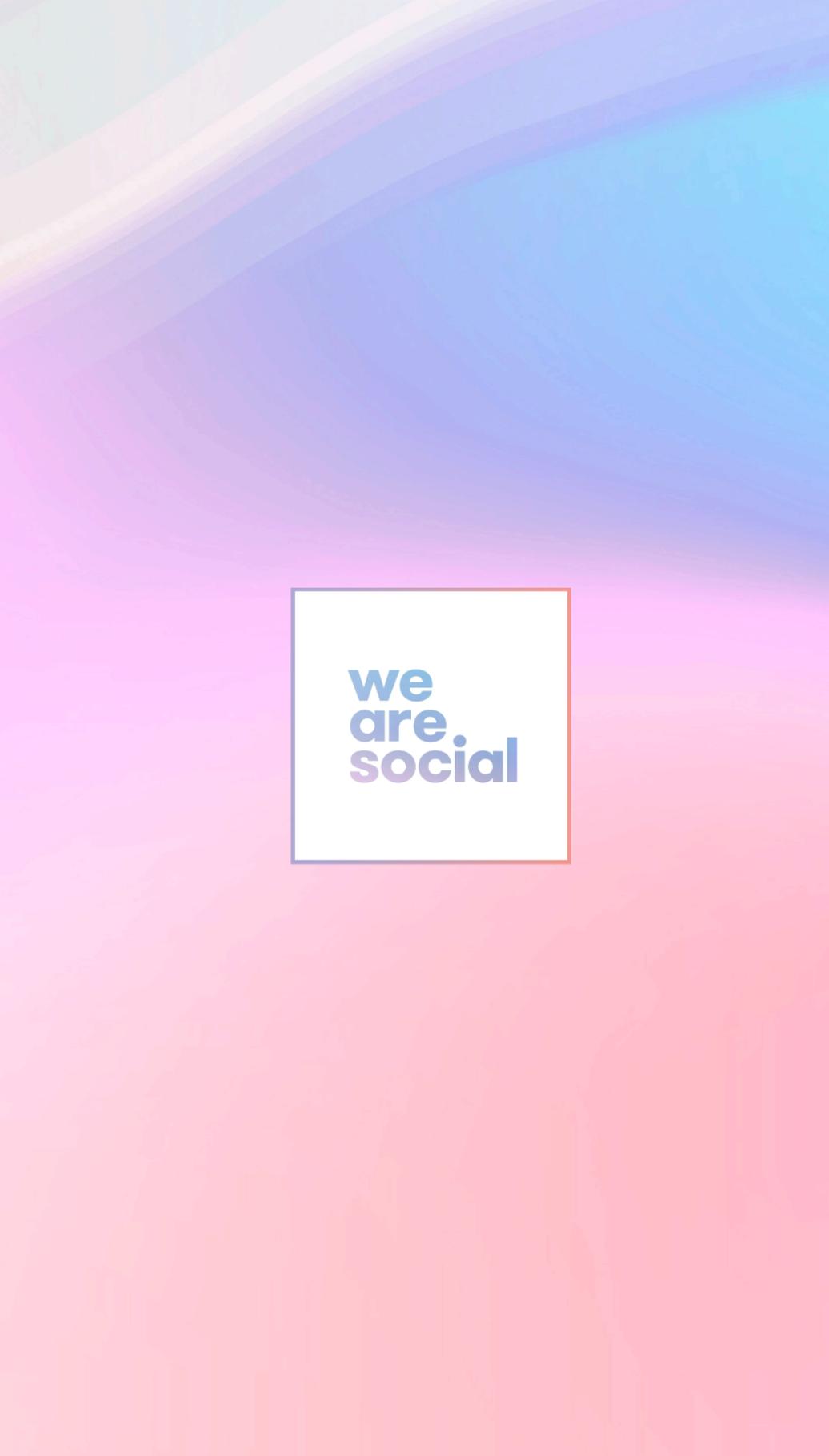




**THINK
FORWARD
2021** | **The
Social Reset**



**we
are.
social**



We connect people with brands in a meaningful way to maximise their cultural impact. That's why Think Forward 2021 unpicks the complex and ever shifting web of consumer behaviour online, and explores the role brands can play in reflecting and shaping it.

In 2020, the social landscape has been disrupted beyond recognition. TikTok has evolved from perky underdog, to mainstream platform du jour to international security risk. Instagram has established itself as a legitimised hub of education and advocacy, alongside aspiration. Digital spaces like Fortnite and Strava have levelled up as social platforms in their own right.

Bolstered by the cultural headwinds of an increasingly visible climate crisis, a global pandemic, and a civil rights movement, our relationship with these channels has undergone an irreversible transformation – for better and for worse. As we move forward, people and brands alike will be forced to relearn how to use social in line with these shifts.



2020

Events shaping the way we use social

Certain events from the past year have played out in interesting ways online. Some will have an irreversible impact on the way we use social platforms in 2021 and beyond.

January

- More than half of the world's population is now on social media
- Australian bushfires underline the devastation of climate change and spur action among global communities online

February

- The threat of Covid-19 begins to impact the global economy

March

- Covid-19 spreads beyond China and the WHO declares it a global pandemic

2020

Events shaping the way we use social

April

- TikTok sets the record for most downloads in a single quarter for a social app ever



May

- SpaceX launched its first ever crewed flight, Dragon 2, which was live streamed to the global population in landmark online event

June

- Statues linked to slavery are pulled down globally in response to BLM protests
- J.K. Rowling gets into digital row over trans rights, igniting wider conversations around inclusivity for trans communities

2020

Events shaping the way we use social

July

- India bans TikTok, along with 58 other Chinese apps
- #StopHateForProfit sees brands boycott Facebook



August

- Jeff Bezos becomes the first person in history to have a net worth exceeding US\$200 billion, fuelling conversation around wealth inequality

September

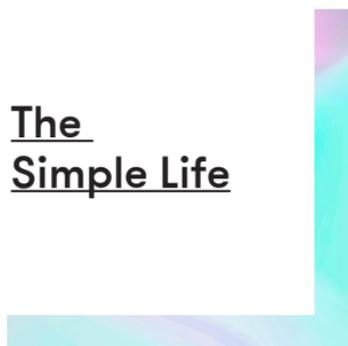
- The global death toll from Covid-19 exceeds one million

THINK FORWARD 2021 | The Social Reset

1



The
Simple Life

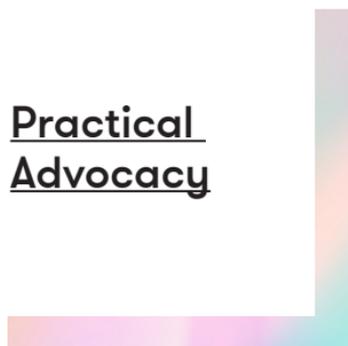


People are using social to reconnect with their core values

2



Practical
Advocacy



People are finding tangible ways to mobilise from within their feeds

3

In-feed
Intimacy

People are finding ways to humanise their digital communications

4

Reliable
Idols

People want public figures to use their platforms responsibly

5

Platforms
Unbound

People are diversifying the ways they engage with social

6

Open-Source
Creativity

People are engaging with collaborative forms of content creation



THE SIMPLE LIFE



People are using
social to reconnect
with their core values



The Cultural Shift

Social has become a highly individualistic and politicised space, which, in the context of the events of 2020, is leaving people wanting more from their feeds. They're investing more time in life's simple joys – the calm of being in nature or the comfort of feeling part of a local community – and shifting the way they engage with their feeds, to complement and nurture these priorities.



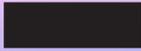
1

The Simple Life





The behavioural change



People are engaging more with their local communities via digital channels

People are escaping to simplified virtual realities

People are engaging with influencers who practice simplicity as a lifestyle



1

The Simple Life

The behavioural change

People are engaging more with their local communities via digital channels.

During Covid-19, local tool kits for how to protect the vulnerable were shared, while some communities have used WhatsApp groups to stay connected to their locale or organise neighbourhood watches.

TECHNOLOGY

The Facebook Groups Where People Pretend the Pandemic Isn't Happening

Online role-playing has taken a turn for the downright mundane.

KAITLYN TIFFANY JUNE 4, 2020

Thread



J'siah
@JbooggyJosiah

Reality is stressful so i joined a Facebook group where we pretend to be ants

12:17 PM · Jul 8, 2020 · Twitter for iPhone

1

The Simple Life

The behavioural change



People are escaping to simplified virtual realities

Whether through Animal Crossing or Facebook Groups for digital roleplaying, those unable to escape the anxieties of modern life in the physical world are finding solace in virtual ones instead.



1

The Simple Life

The behavioural change

People are engaging with influencers who practice simplicity as a lifestyle

People are using social to share a renewed enjoyment of simple offline-pleasures with global communities of like-minded others.



1

The Simple Life

Since launching
his account in
December 2019,
prolific gardener
@gardenmarcus
garnered over
7 million likes
on TikTok

TikTok, 2020

1

The Simple Life

Brands should celebrate the importance of the little things, not just the big things

Mobile game-cum-WeChat sensation from NetEase '100 Things To Do In Life' is a checklist of everyday things that everyone should do, such as taking a family portrait or mastering a dish. Brands can have cultural impact by leaning into this celebration of the simple things.



#人生必做的100件事#

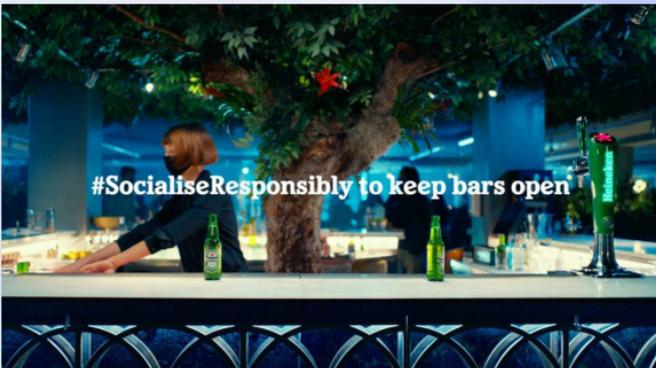
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1

The Simple Life

Brands should invest in local communities

Digital channels are playing a growing role in how people engage with their local communities, so there's an opportunity for brands to celebrate and invest in those communities. Heineken has been using digital channels to crowdfund and keep independent venues afloat, for example.



1

The Simple Life



PRACTICAL ADVOCACY



People are finding
practical ways to mobilise
from within their feeds



The Cultural Shift

‘Armchair activism’ has long been considered the lazier cousin of getting out in the world. But amid the constraints of 2020, and bolstered by the normalisation of long-form formats on traditionally short-form platforms, digital advocacy has undergone a practical transformation. Platforms like Instagram and Twitter are evolving into active spaces for accountability, learning and impact.





The behavioural change

People are getting an education on social justice via Instagram slideshows

Teens are coalescing into powerful online communities to boycott real political campaigns

People are calling out virtue signalling



The behavioural change

People are getting an education on social justice via Instagram slideshows

Touted as ‘PowerPoint Activism’ by Vox, high-design 101s created for the IG carousel format are changing the way we consume information, and pushing Instagram’s role as a source of legitimate education around social issues.



The behavioural change

Teens are coalescing into powerful online communities to boycott real political campaigns

From ensuring that seats remained empty for Donald Trump's Tulsa rally to flooding his app with negative reviews, these online communities are driving offline consequences for political parties.

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

Did a successful prank inflate attendance expectations for President Trump's rally in Tulsa, Okla.?



Alexandria Ocasio-Cortez

@AOC

US House candidate, NY-14

KPop allies, we see and appreciate your contributions in the fight for justice too 🙏

The behavioural change

People are calling out virtue signalling

Blackout Tuesday and #ChallengeAccepted – which saw women post black-and-white photos of themselves in the name of empowerment – both raised questions around why people are really taking part in these viral movements.



Taylor Lorenz ✓
@TaylorLorenz



Replying to @TaylorLorenz

After ending racism with my black square I dismantle the patriarchy with a hot black and white selfie

7:30 PM · Jul 27, 2020 · Twitter for iPhone

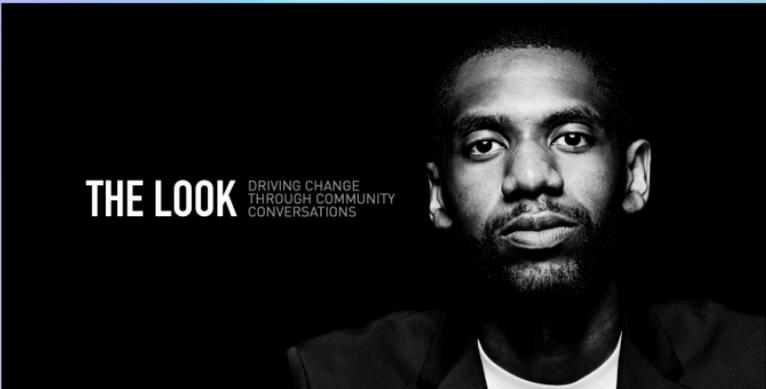


**78% of American
Gen Zers have
used social
media to express
support for
Black Americans**

Yubo, 2020

Brands should educate people where they can

P&G has been running campaigns around anti-Black discrimination for many years. In 2020 it has added weight to its campaign 'The Look', by releasing a number of educational resources outlining the research that underpins its content.



Brands should use this shift to educate themselves

Learning from conversations among trans people on social about trying out their new names when ordering a Starbucks, the brand launched its 'What's your name' campaign. Ultimately, the brand used social to educate themselves on how these communities experience its





IN-FEED INTIMACY



People are finding ways
to humanise their digital
communications



The Cultural Shift

The narratives that circulate have often implied that social media damages our offline relationships. While those anxieties still ring true – as demonstrated by Netflix’s *The Social Dilemma* – recent years have also seen some begin to fall away. Magnified by necessity during lockdowns, certain digital communication tools are being accepted as enhancements to offline life.



3

In-Feed Intimacy





The behavioural change



People are using avatars to humanise in-chat interactions

People are using audio formats to communicate with more nuance

People are connecting to like-minded communities in private digital spaces

3

In-Feed Intimacy

The behavioural change

People are using avatars to humanise in-chat interactions

People are inhabiting virtual versions of themselves to personalise and humanise their digital interactions. The result is a richer immersion in shared digital entertainment experiences.



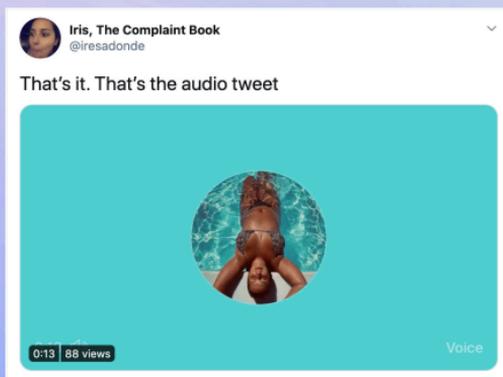
3

In-Feed Intimacy

The behavioural change

People are using audio formats to communicate with more nuance

A new wave of apps like Chalk and Space are experimenting with audio formats that enhance intimacy. LinkedIn has added a voice-note function, while Twitter has introduced audio tweets, though its team is still working on ensuring these features are accessible to all.



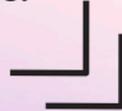
3

In-Feed Intimacy

The behavioural change

People are connecting to like-minded communities in private digital spaces

People are seeking out niche spaces in which they can find intimacy and connection in like-minded communities, away from their public feeds.



3

In-Feed Intimacy

**83% of people
globally feel
brands should be
using their social
channels to create a
sense of community
and support**

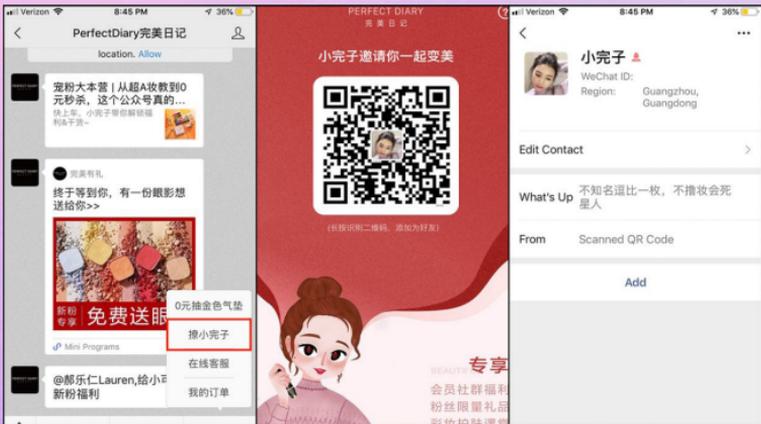
Edelman, 2020

3

In-Feed Intimacy

Brands should be humanising their digital customer services

Chinese beauty brand Perfect Diary created a virtual customer service representative named Xiao Wanzi to connect more intimately with customers in closed WeChat groups.



3

In-Feed Intimacy

Brands can capitalise on this shift to generate a feeling of exclusivity

Speaking to people via more intimate formats can help customers to feel they're getting an exclusive experience. Milan Fashion Week saw Gucci send invites to show attendees for Fall 2020 via WhatsApp in the form of a voice note from creative director Alessandro Michele.



3

In-Feed Intimacy



RELIABLE IDOLS



People want public
figures to use their
platforms responsibly



The Cultural Shift

Recent years have seen a rising backlash against traditional influencers, and in 2020, they're under even greater scrutiny. As a result, a growing emphasis is being placed on the tangible value public figures can bring to our feeds and our lives. Audiences aren't unfollowing beautiful people. But they want them to be more than a pretty face, and to prove that they're worth their place in the feed.

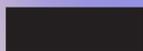


Reliable Idols





The behavioural change



People are looking to influencers they trust to demystify complex issues

People are following respected experts for free access to knowledge

People expect influential figures to give up their platforms for important issues



Reliable Idols

The behavioural change

People are looking to influencers they trust to demystify complex issues

People are looking to relatable figures to help them understand complex issues. This creates new opportunities for brands in 'unsexy' industries looking to demystify their services.



Reliable Idols

The behavioural change

People are following respected experts for free access to knowledge

Healthcare professionals are rising to fame on social platforms, from OB/GYNs to plastic surgeons to therapists. These experts are using social platforms to democratise knowledge people traditionally paid for.

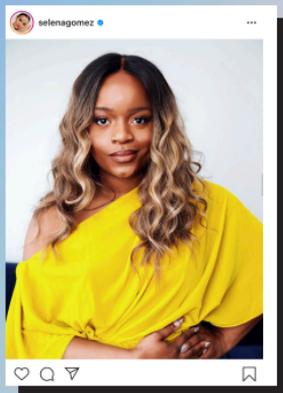


Reliable Idols

The behavioural change

People expect influential figures to give up their platforms for important issues

For macro influencers who've already grown sizable followings, this is about wielding the disproportionate influence they hold responsibly. When people looked to Selena Gomez as an influential voice during the BLM protests, she gave up her platform to figureheads like Brittany Packnett



Trustworthiness is
the #1 trait people
have looked for
in influencers and
creators, following
the outbreak
of Covid-19

GWI, 2020



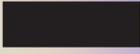
Reliable Idols

Brands should be harnessing expert voices to address important issues

Brands should also be tapping into their own internal experts to evoke authority and inspire trust. Fortnite hosted in-game event series We The People, which discussed racism, while Chipotle collaborated with Queer Eye star Karamo for a Pride 'Lunch & Listen' on TikTok.



Reliable Idols



Brands should be vetting creators to assess their integrity

Working with talent across the political spectrum will grow trickier, and people will expect more transparency around who brands are working with. We're already seeing this play out in numerous disputes around actors who've professed their political beliefs online.



RJ Barrete
@rjamesbarrete



People are calling for [#Mulan](#) 🧑🏻🎭 boycott because of Liu Yifei's support for Hong Kong's police brutality, then people should also do the same and boycott Gal Gadot's [#Wonderwoman](#) because of her pro-IDF stance against Gaza.

8:08 AM · Dec 8, 2019 · Twitter for iPhone





UNBOUND PLATFORMS



People are diversifying
the ways they engage
with social



The Cultural Shift

Amid the new content needs of 2020, users, creators, brands and platforms have expanded their social horizons. Emerging platforms like TikTok and Twitch assimilated into the mainstream, the inertia attached to previously untapped features in major platforms (like lives) fell away, and digital spaces like Fortnite and Strava established themselves as legitimate social platforms. People have picked up some new scrolling habits, bolstering the already prominent role of social in everyday life.





The behavioural change



People are evolving
the ways they organise
information on social

People are attending
scheduled digital events

People are hanging
out in games, not just
playing them

The behavioural change

People are evolving the ways they organise information on social

As the reasons for using social platforms diversify, the way people explore and organise content is evolving accordingly. The use of Saves on Instagram points to a shift in how people organise content they want to come back to.



iris
@niallsfckr



can tiktok add this thing where you can "save" video's on tiktok and categorize them in different folders like instagram saves would make my life a lot easier

3:34 PM · Oct 13, 2020 · Twitter for iPhone



The behavioural change



People are attending scheduled digital events

Live content is changing the way people fit social platforms into their lives. Rather than opening an app or tab on an ad-hoc basis, people are increasingly shaping their offline plans around scheduled, can't-miss, in-platform moments – like Lizzo's live meditation.



The behavioural change

People are hanging out in games, not just playing them

Up until now, the social benefits of online games have been a secondary benefit. Now, the emergence of features like Fortnite's Party Royale mode point to a future in which people go to games to socialise, first and foremost.



On Instagram,
where there's been
a shift towards
text-based
communication,
Refinery29 went
from 41%
text-based posts
in January to
72% in July

Axios, 2020

Brands should reassess their assumptions of the most effective formats on each channel

The formats that define platforms are evolving. It's why Facebook has axed its '20% rule', which historically penalised ads for including text that took up more than 20% of an image – now, text-heavy formats are welcome in spaces they were previously condemned.



Matt Navarra ✓
@MattNavarra

BIG news for Facebook advertisers:
Facebook is killing its '<20% text in image' rule for ads
Source: Facebook

...

Brands should consider moves to new platforms but integrate with sensitivity

The culture of a platform is shaped by its community. Engaging effectively with these communities is key to finding success when you're there. When Gucci saw potential in gaming platforms, for example, it partnered with Fnatic e-sports stars to run a





OPEN- SOURCE CREATIVITY



Content creation
is becoming more
collaborative

The Cultural Shift

Creativity on social has always thrived through the removal of gatekeepers, the democratisation of tools and the fluidity of remixing what's already available online. But the process of content creation is becoming notably more communal, with TikTok's meteoric rise serving as a tipping point. Spearheaded by young, creative audiences, and enabled by sophisticated tools and formats that encourage participation, the feed is increasingly a place to co-create, not just consume.





The behavioural change



People are collaborating with their heroes via social

People are participating in TikTok cults

People are repurposing #challenges as evergreen content streams

The behavioural change

People are collaborating with their heroes via social

People are growing accustomed to their heroes putting them and their talents in the spotlight. While Charli XCX collaborated with her fans via Zoom to write her latest album, on Instagram, film industry polymath Miranda July has been crowdsourcing entire scripts from her followers.



6

Open-Source Creativity

The behavioural change



People are participating in TikTok cults

Trailblazed by Melissa Ong (aka @chunkysdead) and her hyper-dedicated following, TikTok cults – which blew up during lockdown – are defined by a collaborative creator-follower relationship. Ong’s community directly feeds the content she creates and act as stakeholders in her output.



The New York Times
Step Chickens and the Rise of
TikTok ‘Cults’

6

Open-Source Creativity

The behavioural change

People are repurposing #challenges as evergreen content streams

In 2020, social ‘challenges’ serve as easy-to-find digital spaces where people can create, and recreate, content around a unified theme. In the #euphoriamakeupchallenge on TikTok, for example, users create make-up looks and tutorials inspired by HBO show Euphoria, encouraging viewers to participate, too.



6

Open-Source Creativity

When Dua Lipa
launched a TikTok
competition
for people to
collaborate with her
on a music video for
her single Levitating,
submissions
garnered over
4.7 million views
in just six weeks

TikTok, 2020

Brands should stop behaving like gatekeepers, and foster creativity.

Brands that have the cultural footprint to do so should try to facilitate creativity within their audience. For example, fashion designer Reese Cooper launched RCI - DIY, a collection released alongside patterns and instruction booklets, encouraging aspiring designers to make their own clothes, not just buy his.



6

Open-Source Creativity

Brands should use comments and community management to inspire content.

In this landscape, anyone who engages with a brand's content could potentially inspire future content. On Instagram, Gymshark has already been leaning into this shift. After a body positive photo of a plus-size model on



6

Open-Source Creativity

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talktous@wearesocial.net

wearesocial.com





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