

***SOCIALHYPE TRENDS
2021/22***



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WAIT... WHAT JUST HAPPENED?

In a year like no other, social saw an unprecedented surge in use as the current health crisis took a big red marker to our 2020 diaries and dramatically reduced our options for “IRL” (In Real Life) connection - quite literally overnight. We may have hit pause on our social lives, but our lives on social have become richer, more important, more meaningful, more sombre, more uplifting, more problematic, more overwhelming and about a million other ‘mores’ than ever before. Is this The New Normal™ for social? Or ten months on, are we still in the midst of a big reset?

As a global audience, we are all weighing up and reassessing the priorities in our personal lives. Who do we trust? What do we want to see? How much time do we want to spend looking at it? On the other side of the screen, brands of all shapes and sizes are feeling fragile, with many sectors being forced to adapt in a hurry. Those in the hospitality and events industries have had the biggest shock to the system, with businesses rushing to pivot their offering to suit a new, digital-first reality. We’ve seen a spike in side hustles, generations of consumers switching up their buying habits and growth being hacked more viciously than your dad’s garden hedge.

Now we’re in 2021, there are as many new opportunities as there are new challenges. As our online existence matures and fragments into a series of value-driven communities, brands will finally start to figure out where and how they fit into their customers’ lives - and (spoiler alert) the answer could be somewhere away from the big blue platforms we’ve come to know and “trust” over the years (more on that later). With some new, innovative and pretty amazing spots to hit potential customers as they browse, connect and play, we are also likely to see a more back-to-basics approach, with a renewed focus on search, structure, syndication and signposting being applied to make content easier to find.

The big question? What do we really want from the supersonic world of social media in 2021? We believe social can still be a force for good - if we come together to make it better.

Time to push things forward...



WHO RUN THE WORLD? TIKTOK

The best social content in 2021 will be on TikTok. There, we said it. You can all go home now.

Grand statements aside, 2020 was the year of TikTok - and creators on the channel show no signs of slowing down now. When *Strictly Come Dancing* is actively promoting its TikTok content in the middle of a live prime-time Saturday night show, you know it won't be long before your mum starts asking "did you see my latest latest Tok?". With 1bn monthly active users worldwide, and more than 1bn Tiks (or Toks – thanks Mum) viewed every single day, these guys aren't messing around - unless you count silly dance routines, daft lip syncing, crazy camera tricks and teacup pigs wearing elaborate costumes (which of course, we do). Our big blue friends in Silicon Valley need to sit up and pay attention. What can we learn from TikTok?

The best thing about TikTok is that it is a level playing field. Anyone can go viral, no matter how many followers they have, and loungewear is practically a must - which in 2020, suited us just fine. Instagram jumped on the bandwagon and launched Reels as a competitor in August 2020. But is it a serious competitor? Not yet. TikTok is simplicity itself - its great UX means you can easily share content created on TikTok to other platforms. Reels, on the other hand, has been labelled "the worst Instagram feature ever", confusing, frustrating and difficult to navigate – everything TikTok is not. That said, Reels is one to watch. Every Insta feature starts off this way but ultimately gets tweaked, smoothed out and made better. Case in point: do you remember when Instagram didn't have Stories? Or when Stories seemed like a terrible version of Snapchat? Us neither. Reels is an easier, short-term investment too, since at this point, you're probably already fully committed to the Instagram universe.

Back to TikTok... Having employed some of the world's most creative thinkers from social and beyond to hone its social-first offering has proven a masterstroke. But with things so hunky-dory, how can the phenomenon evolve? By taking a platform perfect for entertainment, and using it to share valuable learning content. #Learningontiktok is a place to discover how-to and informative UGC videos, taking viewers through making food, producing art, scientific processes and just about anything else! The company has been busy cultivating a new image as a go-to platform for learning more serious things, not just messing around. Love it.

Is TikTok entirely safe? That remains to be seen, but if its 'Supporting Creative Expression in 2020 & Beyond' blog post from 29 December 2020 is anything to go by, it's certainly a key focus for the platform heading into 2021. With expansion of its Global Trust & Safety hubs as well as its dedicated global security teams the platform says it's putting wellbeing, brand safety, transparency, inclusion, authenticity, youth safety and security as key foundations upon which to grow in the year to come.

A person wearing a red cape and a dark shirt is seen from behind, looking up at a bright, glowing light source in a blue sky. The light creates a vertical beam of white and pinkish light. The overall scene is vibrant and futuristic.

IT'S "GAME ON!" FOR BRANDS

What if you could watch your favourite music artist, or that must-see movie from your favourite director - all in the metaverse? Thanks to branded content integrations from app and game developers, you can. While this is not an entirely new trend - branded content integrations brokered between advertiser and app have been going on for some time (think Apple and Nike) - we're starting to see developers, artists and brand sponsors get really creative with the experience they provide.

It seems that games – until now, largely ad-free - are the next frontier for brand marketers. Those of you with young ones addicted to Fortnite may have noticed a whole spectrum of branded in-game content in recent years, as savvy advertisers have rushed to reach young eyeballs where they spend a huge chunk of their time. With much of the real world off limits in 2020, things just got even deeper...

Fortnite's new "Party Royale" social mode is an experimental and evolving space where fans can chill, hook up with friends, and enjoy some stress-free minigames (there is no combat or building in Party Royale mode). Designed as a way for brands and artists to get in front of an audience that would otherwise be difficult for them to reach, Party Royale even features a 'main stage' concert venue for scheduled virtual music performances, the most mindblowing and spectacular of these being Travis Scott's 10-minute animated masterpiece in April 2020. Tens of millions watched live as Scott's virtual avatar changed form and roamed ever-changing landscapes. We often look to the music industry for signs of future creative trends and this was one of those times where we watched in awe at a real landmark moment for gaming, music, live events and marketing all moulded into one.

Meanwhile, over on TikTok, The Weekend was doing the same. Labelled an "interactive and immersive cross reality experience" fans and viewers watched live as The Weekend (in digital avatar form of course) led fans through a "hallucinatory XR dream world". Think of it like this: if Instagram was all about presenting the best versions of ourselves, then cross-reality is all about presenting the best versions of our imaginations.

Elsewhere, basketball game NBA 2K21 recently came under fire for placing ads in the loading screens of games for VR headset, Oculus Quest. Right advert, right person, right time. Our prediction is that brand marketers will get even more creative next year, working with developers to bring artists and products into this up-and-coming space.



THE REVOLUTION WILL BE SCROLLED

The trend to end all trends, we're entering a new phase in the brand purpose journey. From workplace equality to environmental issues, and especially fighting racial injustice, 2020 taught brands that silence is no longer an option – and that simply taking a stance on key issues is no longer enough.

Audiences have little tolerance for virtue signalling - brands that appear to care about issues on the surface while acting very differently in their day-to-day approach. To be taken seriously, especially by the 54% of young customers who say they would actually boycott a brand based on their ethics, brands must take meaningful and sustained action on political, environmental and social issues. Everything else will follow.

Widely regarded as a frontrunner in corporate social and environmental responsibility, sustainable outdoor clothing and apparel brand Patagonia is a fantastic example of a brand talking the talk and walking the walk. Every part of its website and social channels lives and breathes its mission and purpose, from its 'Worn Wear' and 'Buy Less, Demand More' concepts, activist campaigns and heavy promotion of safer working conditions, to donating 100% of its sales from Black Friday to environmental organisations.

Purpose hasn't just been at the forefront of Patagonia's marketing since the social media age though. In November 2011, the brand ran a controversial Black Friday ad in The New York Times urging people "Don't Buy This Jacket" - alongside a photo of its latest winter jacket. The ad was filled with information around its Common Threads Initiative (Reduce, Repair, Reuse, Recycle, Reimagine) and put the focus entirely on raising awareness to consume less. 10 years later and the same sentiment, intent and inspirational messaging ring true each day through its social channels. "We're in business to save our home planet" reads the headline message on its Instagram channel.

As 2021 gets underway, it's not perfection consumers are looking for, it's progress - steps in the right direction. Steps we can all make in our own way.



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NICHE NETWORKS

Why do we go online? To find people like us? To be entertained? To learn something? Following the strengthening of niche communities on and off the usual big blue suspects, in the next year we predict a mass migration to new, smaller and more specialist platforms. From subscription-based services, to paywalls and premium models, it's also worth pointing out that quality content is no longer necessarily free. Whether you're dealing with a loyal readership of a newspaper, a close community of music fans, or undertaking an online course, many are happy to pay for content that speaks to them.

With everyone spending more time online while marooned at home, the next stage of social will see many retreating from the chaos to areas of the internet formed around their specific passions and needs. This is obviously huge – Facebook and Twitter have been a big part of our lives for years now, but with concerns around truth, trust and toxicity, they may be consigned to internet history, unless they can rise to the challenge and win people over once more.

What will replace them? If you've ever been to Houzz for interior inspo, logged a run on Strava, streamed games on Twitch, or posted a design on Behance, you're already ahead of the game. There's Mixcloud for DJs, Depop for thrifty fashion, NextDoor for connecting you to your neighbours - the list of new networks and internet locales is endless.

In particular, we'd keep our eyes on the Mixer vs Twitch match-up in 2021. As the Amazon-owned live streaming giant Twitch continues to do battle with Microsoft-owned newcomer Mixer like Mario facing Bowser, many brands might be wondering if and why they should care. While both started out as livestreaming platforms for gaming and esports, streamers cover just about anything you can think of these days, from cookalongs and workouts to political roundtables and in-depth streams on how to design custom sneakers. Yep, Twitch has quickly become the go-to place for livestreaming pretty much anything. In 2020, brands started paying attention. In 2021, we predict even more will follow.

These niche networks are founded on peer-to-peer interest, community, quality and trust – things that have sadly been lacking on some of the big platforms in recent years. These are spaces that brands can play in safely – speaking to an audience they know will care and gaining sales among an already-engaged audience, and even more refreshingly, the communities with algorithms aren't (as yet) overly manipulated.



YOUR NEW ‘VIRTUAL’ COMPETITION

Halfway through 2020, award-winning digital content creator Jimmy ‘MrBeast’ Donaldson (who at the time of writing has over 48 million YouTube subs) joined forces with Virtual Dining Concepts, a delivery-only restaurant concepts company, to create MrBeast Burger – a virtual restaurant brand (US only). A move which might just be a game changer in the influencer and creator space.

“MrBeast Burger operates out of existing restaurant kitchens, allowing restaurateurs to add a new source of revenue without impacting operation. Customers can only order MrBeast Burgers via the propriety app or through major food delivery service apps. MrBeast Burger is available for restaurants to prepare out of their existing kitchens as a way to generate a new revenue stream – the menu is accessed only via apps and it is delivered directly to your door.”
(mrbeastburger.com)

“It’s just burgers?!” we hear you say... Nope, there’s an entire clothing line, with everything from aprons and hats to loungewear, tees, drinks bottles and backpacks. Make no mistake, this is a brand. And it might just be the start of a whole new movement.

If influencers and creators were all about creating content to help *your* brand reach more and sell more in 2018, 2019 and 2020, in 2021 they might just become your competition. With the huge growth in delivery services such as Uber Eats and Deliveroo (currently valued at \$7bn) comes a unique opportunity for influencers and creators to develop new kinds of revenue streams, virtually, and very much built around or inspired by the delivery-only concept. It won’t just be food either. With an audience of 48 million highly engaged followers, MrBeast has the reach, the awareness, the platform, the brand; he just needs the product... or a virtual product.

Watch this space...



THIS YEAR'S WILDCARD

Every year, when compiling the trend report, we always like to throw in a wildcard. A curve-ball. A longshot. Something from left-field that might just take everyone by surprise. Of course, predicting trends is tricky business at the best of times. And not business we'd advise anyone to enter into lightly. Throwing wildcards into the *finger-in-the-air-at-the-best-of-times* mix certainly keeps things interesting. We've been right. We've been wrong. Where we were right (Instagram in 2010 and TikTok in 2018) we were right. Where we were wrong (Foursquare in 2010 and Ello in 2014) we were oh-so-very wrong. So here goes nothing... This year's wildcard to take over the entire social mediaverse is... Clubhouse.

"WTF is Clubhouse? Don't tell me it's another InstaTok app I've got to figure out all over again?!" (a genuine response I had when pitching this to a family member last night).

Well, what we can reveal is it's definitely not another InstaTok app. In fact, it's the opposite. Where Instagram and TikTok are all about images and video, Clubhouse is all about audio. No videos, no visuals, no distractions. Just conversations (and some music). If all that sounds a bit basic and podcast-y, that's because it is – well, kind of. Think of it like a live podcast that you can join in with. It's real-time only too, so anything said within each chatroom cannot be recorded and shared outside of that moment – apparently. Twitter has since jumped on the voice-based bandwagon, launching its own Clubhouse clone (great name for an album) Spaces, in December. Our general rule for social success: "when they start copying you, you know you're on to something". Don't they also say, "the originals are best?" Our bet is placed firmly on Clubhouse as the one to watch.

Still in its early adopter invite only/beta group stages – or 'super cool exclusive bla bla bla' phase as we like to also call it - there's already 600,000 users, including Drake and Oprah. Nuff said.



BETTER TOGETHER

Brands collaborating with each other via huge marketing campaigns is nothing new (Red Bull x GoPro, Adidas x Kanye, Spotify x Starbucks). But what might be the start of a major new trend emerging is brand collaborations played out purely and exclusively in social media channels. Imagine if the only way you could have watched the Red Bull x GoPro Stratos video was via Instagram Live or the only way to get hold of the latest Adidas Yeezy footwear drop was via promotional codes on TikTok.

We've already seen glimmers of this kind of activity back in 2017 with the partnership between social media news app Flipboard and Airbnb; a partnership that lived within the Flipboard social app, offering exclusive content and experiences to Airbnb fans that were unavailable anywhere else.

Fast forward to 2020 and we saw hints of it again - albeit in a very different way - when BrewDog and Aldi took to Twitter to join forces. Not that this particular partnership started out with the best intentions.

When BrewDog founder James Watt saw a beer on Aldi's shelves which looked suspiciously like 'Aldi's take on Punk IPA', he did what we all do when we feel slighted in this modern world. He Tweeted. Ending his post with the suggestion that Aldi might be interested in a collaboration, followers watched eagerly as the conversation shifted from showdown to showcase in just a few hundred characters. One emoji led to another, and soon enough, Aldi was stocking a special edition BrewDog-brewed "Ald IPA" on its shelves. More importantly, for every case of Ald IPA sold, an extra tree will be planted in the BrewDog Forest. A win-win for customers, the planet and the Punch 2021 social trends report.

Was it a clever social PR stunt all along? Maybe. That said, it also might just be the beginning of a big new trend. And remember, you know what they say: no two brand collaborations played out exclusively in social are alike. Or is it snowflakes? No two snowflakes are alike? No, it's definitely the first one.



THE RISE OF THE EXECUTIVE VOICE

When we predicted the rise of the “Social CEO” last year, we could never have imagined how important it would be to have visible, transparent and socially-engaged leaders reaching out to and reassuring their people, stakeholders, customers and candidates via social. Now, with digital connection at the heart of corporate life, we’re seeing more and more talent get involved, polishing up their respective executive voices to discuss the burning workplace issues of our time.

With CEOs under more pressure than ever to be present online, brands are investing in internal digital hubs to allow executive teams to communicate updates more freely, yet seem to be floundering when coming up with truly valuable content. There has been a noticeable shift in term of the energy brands are putting into building advocacy and employer brand through smart use of comms.

But with even more noise out there than we have seen before, we predict that the best companies will be investing almost as much time, money and effort into their executive content as they do their external marketing campaigns.

Our advice? A winning trio of strategy, campaign thinking and good content planning is the best way to bridge the gap between HR and marketing. When it comes to the content itself, it’s all about authenticity, transparency and being human. Be genuine, accept failures, embrace mistakes, celebrate meaningful work and give followers a positive vision of the future. In a world groaning under the weight of bland content, being real and hopeful goes a long way.



SHAREABLE BECOMES SAVEABLE

We're used to sharing content we like and find interesting (or hilarious) with our friends and followers, before letting it slip into the wasteland of our profile memories. But what if a piece of content is so great, we end up not sharing it, but saving it, so that we can enjoy it ourselves at a later date? There is the argument that the kind of content we share speaks to the more closed off side of ourselves. For so long, one of our key aims as marketers has been to create content that resonates with the user so much that they end up sharing it with their friends. But according to research, the average Facebook user has only shared one post in the last 30 days, with people increasingly choosing disappearing mediums like Stories over their feeds to share things that interest them. It looks as though the era of shareable content could be moving to its next chapter.

What will that look like? It could mean more curation of the very best of a subject, so that users can pick and choose from a steady flow of content that is sure to resonate with them. We're also seeing users do more with their content themselves, saving content to folders or online pinboards like Pinterest, Evernote or Google Keep to use or enjoy later. Tools like the Thread Reader app also help the user condense tweets from a long thread into single post, so you can quickly and easily get the gist of the content. Saveable in a different light, could be seen as a sort of content-hording, so good you save it for yourself. But if that ever-expanding folder of 'decks to read' is anything to go by, you'd better start reading.

Brands will need to get organised with content, adding more CTAs, structuring content properly and adding tags for content syndication. If the #Learningontiktok trend tells us anything, it's that no matter what the platform, people love content that teaches them something new or inspires them to see things differently. If brands are to focus on increasing the saveability of their content in 2021, we think teaching and inspiring are a great place to start.



5G ELEVATES DIGITAL EXPERIENCES

The content and creator worlds are buzzing for 5G, the next step in cellular network technology. And it's a worthy cause for celebration. 5G is faster than Usain Bolt at the Olympics – and that's damn quick - promising to 10x today's internet speeds as a minimum. Welcome to the world of lag-free social, as latency drops to mere milliseconds.

But how will it impact brands specifically? Improvements in mobile tech have historically opened the door for new, longer and more interactive content on platforms. Let's take our old fav, Instagram. We've gone from static images and some dubious filters to 30-second video, we've moved from 30-second video to 1 hour plus video with IGTV, and we've moved from IGTV to endless clips and transitions in Reels. More speed = more consumption.

And it's not only social 5G will help. Interactive in-store experiences will also become much more seamless as the social and physical world collide. Typically, these AR-led activations would need apps, but now social channels offering AR experiences (Snapchat, Instagram and Facebook) take on new importance for brands who can utilise the mass reach of these social channels. This should make interactive in-store and OOH experiences a major brand trend for the year ahead (when stores can safely reopen, obv).

The much-derived banner advert will see a makeover, as 5G will hopefully help to make online display adverts much more interesting. Expect more AR experiences in adverts as we move away from statics and GIFs as the standard for online banner ads. Will you be taking advantage of 5G to elevate your brand's digital experiences?

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CREATORS > INFLUENCERS

Remember the days when everyone said that influencers were just a fad with no real lasting value? Well, how wrong were they? For many brand marketers, influencers are often fascinating, but then in equal measure can be just as difficult to work alongside and achieve results with. What we know about influencers in 2021 is that they are a big part of the conversation when it comes to brand marketing - and whether it's reach you're chasing or direct sales, they are a tactic in the toolbox.

Creators are often labelled as influencers, yet offer a much different and more compelling proposition for some brands (and seemingly hold quite a few of the cards with social channels). We think 2021 will be the year creators overtake influencers.

Quite literally, the world's biggest social channels are falling over themselves to pay for their creativity. Snapchat, TikTok, Instagram, Spotify and YouTube are all paying for creators to make platform-ready, slick, viral, engaging content. Like a football team made up of Galacticos, it seems everyone is keen to sign up the latest creator stars, to wow audiences. Influencer networks such as Tribe are also now paying for creators - and brands may have some joy here, matchmaking with individual creators without the hassle and back and forth.

Brands - demand greater authenticity and invest in influencers only if you are confident about the results. And think about creators in 2021, not only as an alternative way to showcase what you do, but to work alongside your agency or in-house teams to shape how your social content comes to life in ways which really do *influence* your customers, advocates and sales.

A photograph of two skateboarders standing on a green-painted street. The person on the left is wearing a light blue t-shirt, white shorts, white socks, and white sneakers with a leopard print pattern. They are holding a skateboard with a green deck and a graphic design. The person on the right is wearing a yellow t-shirt, blue denim shorts, yellow socks, and white sneakers. They are holding a yellow skateboard with a graphic design. The text "@PUNCHCOMMS" is overlaid in the center in a large, white, italicized font.

@PUNCHCOMMS