RED SKY PREDICTIONS 2020

10 PREDICTIONS FOR COMMUNICATORS IN 2020

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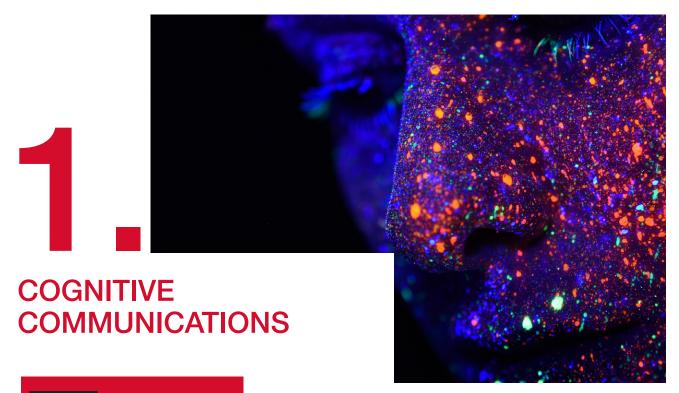
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Prediction: Cognitive computing will help communicators more quickly and efficiently connect the dots so we will no longer have to guess what news is about to break, what headline will make waves and where, and which conversation topic or social influencer will resonate most.

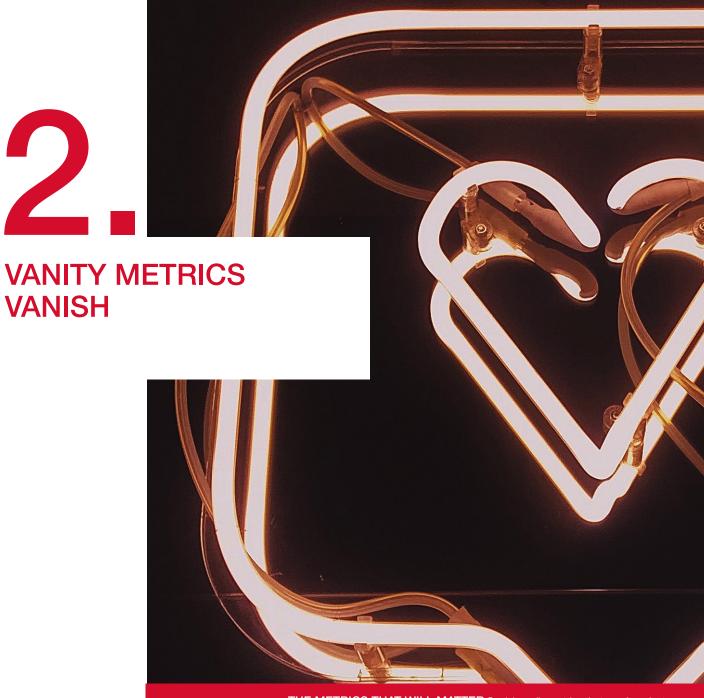
Trendspotters have kept "artificial intelligence" and "machine learning" foremost on our lips for the past decade. We've foretold the ways in which these technologies would let data do both the talking and the learning for brands, thus massively impacting how humans everywhere do

what they do. Now we can look for cognitive computing to let data do the thinking for brands.

It's forecast that by 2021, <u>80 percent</u> of emerging technologies will have Al foundations. Many of these can be expected to run on predictive analytics and technologies, so cognitive computing will earn a place in just about every product, service and solution we touch in the coming years.

In essence, because cognitive computing is powered by predictive analytics, it will have an uncanny ability to predict future events. Across industries, it will be used to uncover unexpected outcomes, mimic human mastery, contribute to contextually relevant conversations, and enrich human research and recommendations. Red Havas is making significant investments in Al and predictive technology, with plans to launch a powerful new tool this year. (In fact, we're willing to bet that by this time next year we'll be using it to help us outline our Red Sky Predictions for 2021.)

Cognitive computing will be especially germane to those of us in PR and influencer marketing, as we'll be able to use it to make informed decisions about which influencer will be the ideal brand ambassador and/or which might pose the biggest potential risks for brands to affiliate with. We can also use it to identify what type of content and call to action has the best chance of driving the desired outcome, whether we're pitching the media or crafting messaging to sell a product.



THE METRICS THAT WILL MATTER Social media metrics that aren't mainstream right now are going to be the ones that are most meaningful in the years to come.

1. Share of visual voice: Measuring the share and recognition of a brand's visual identity will become mainstream and top of mind for marketers. In 2020, more brands will start to care and measure how often their brand logo is shared and seen across social channels. Visual intelligence tools such as Talkwalker allow for this type of listening, assessing both still and video content.

Sentiment analysis via slider: Ephemeral, or disappearing, story consumption is huge, but how to

track its success, beyond looking at ephemeral story exits? Since Instagram introduced the emoji slider sticker in 2018, brands have been using sliders to quickly and easily get a read on average sentiment. This will continue to be perfect for testing content, ideas and creative that can lead to more and better content.



The "like" button celebrated its 10th birthday last year, which is also the year it began to

become irrelevant on top platforms like Facebook and Instagram. What began as moderate measures by social media companies to protect people from harm—e.g., in 2018, Instagram introduced an anti-bullying feature that filtered out comments meant to

harass—led to both <u>Facebook</u> and Instagram experimenting with hiding likes in 2019 in Australia, Canada, Ireland, Japan and the U.S.

In the meantime, apps like TikTok that don't rely on a friend or follower system have ballooned in popularity. It's not for nothing that TikTok was the third-most-downloaded app in 2019, behind WhatsApp and Messenger and ahead of Facebook and Instagram.

But, *like*, now that the "like" button and other vanity metrics are being phased out, how will influencers and social media pros determine the success of their social efforts?

We have known for a long time that just because consumers "like" something, it does not mean that they intend to purchase a product or take any further action. For that reason, we can consider it a good thing that marketers are being weaned off flimsy vanity metrics. We welcome in their place those metrics that brands can really hang their hats on—e.g., video completion rates, dwell times and Instagram Checkout conversions.

It will no longer be about counting comments and likes but about counting how many times the story was told in the right way through metrics such as sentiment scores and key message penetration. For example, what good are 800 comments on a post if they're all negative? When brands simplify their marketing and measurement through clear metrics that are tied directly to business objectives, they will be better able to measure not just the *count* but also the *context* of their communications efforts.

And, no surprise here, we can look for Al to have a role in social metrics as well. Right now, you click a "like," "comment" or "share" button (take a physical action) in response to content you enjoy (or that you want to react to because you do not enjoy it), and this lets the brand or person who published know how you feel about it. But in the future, as brands adopt intelligent metrics such as facial recognition to determine people's reactions to content, they won't need your "likes" to know how you feel about something. Your expression will be worth a thousand words.

3. Dwell time: Video views are important, but how valuable is a three-second video view? If you can hold your audience for more seconds, it means your content is resonating. Dwell time can be measured across all types of content, including Stories. For instance, it will be important to look at the completion rate and what percentage of viewers drop off when a series of connected stories is created. Did viewers backtrack to look at that video again?

Prediction: A brand's social media

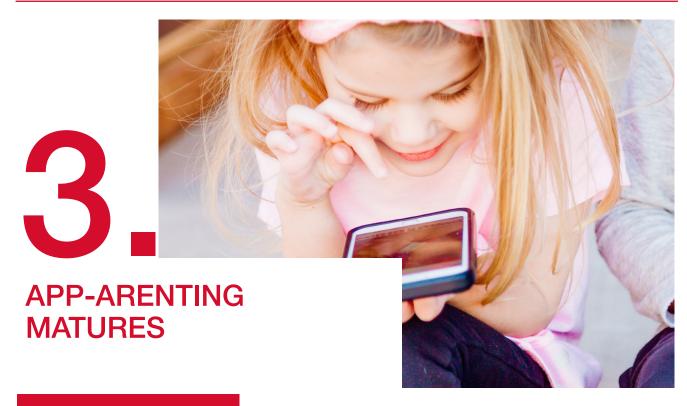
success will no longer center on the

"likes," but rather on the quality and

old obsession with the number of

performance of the content.

- Share of voice: The key to grabbing attention is being the first to ride the coattails of a trending topic and amplifying it, but what if you already know what topic will trend? Through predictive analytics, more brands will determine what the next logical topic will be and adjust their content calendars to be first to market and grab share of voice for increased brand exposure. Brands can prepackage content for their influencer marketing campaigns to be the news-breaker instead of just the news-sharer.
- Paid social ROI and remarketing metrics: Marketers must prove social ROI on their bottom line in order to prove channel relevance. Conversions sometimes take time, and with programmatic paid campaigns, it takes optimization over time to reach optimal results. More marketers will be focused on automating paid social implementation and paid/creative optimization through AI-based tools such as Brand Networks.



Prediction: With many effective tools available to restrict and shield their children's online activities, more parents will set smart, strategic limits on screen time.

Parents in the digital age must consider a whole universe of online threats. Wouldbe predators groom young children with anonymity inside game interfaces. Tweens use social media to bully their peers. Children are exposed to hundreds of ads per day.

Video sites provide access to pornography, violent images and hate-filled propaganda.

Device addiction is also a growing concern. In part by design, our screens and apps deliver a dopamine "hit" not unlike that experienced by cocaine or gambling addicts. People are starting to acknowledge that this can cause permanent changes in the brain, and it's not clear what effect the rise of smartphone and tablet use among very young children will mean for their long-term development.

Parents are more educated and aware than ever about these online risks, and they are not without weapons in the battle, both built into popular phone and tablet operating systems and available as third-party apps with a growing array of smart features. Many of these tools have matured to the point where they give parents almost unlimited control over how their kids

communicate online, what they view, and when and for how long they use their phones. Or they can simply monitor all their children's online activity.

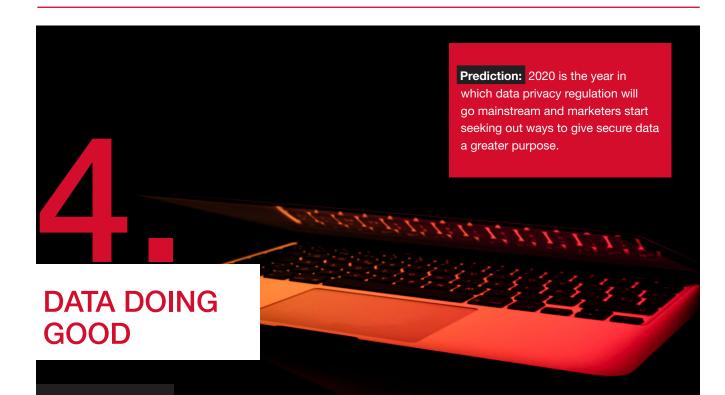
Meanwhile, many popular apps offer kid-friendly versions that provide a safer, ad-free digital sandbox for youngsters to play in, including Facebook Messenger, Spotify and Snapchat.

And YouTube has just rolled out a new children's privacy policy guaranteeing to parents that content creators will be obligated to specify whether their content is made for kids or not.

Many experts advise that the best way to teach good technology habits is to model them, which means being emotionally present when interacting with children, showing them how to use devices more as tools and less as entertainment, preserving some times of the day as technology-free, and not using screens as a babysitter.

There's no question smartphones are a vital tool, but many of us are starting to feel the need to take back the reins a bit. When it comes to protecting our children and helping them develop good habits, we now have access to a mature suite of tools that many more parents will take advantage of.





With over 2 quintillion bytes of data generated every day, data is arguably one of the world's most valuable and pervasive currencies. Many companies are already well-versed in the ways our personal data, preferences, movements, clicks and purchases can be turned into wealth. Now they'll be looking at how this wealth of data can also be used for social good.

A few interesting examples: Shopping data from grocery loyalty cards can help researchers get a peek at our diets to form hypotheses for medical research; smart-thermostat data can provide new ideas for practical energy conservation practices; and cellphone use data can show patterns of mobility, isolation, physical activity and sleep that researchers can use for the betterment of personal and societal health.

What does this have to do with brands? It provides yet another space for them to consider expanding and enhancing their corporate social responsibility efforts. Brands that want to lead and get noticed know how vital it is to find a unique space to make a meaningful impact. In 2020, we see a trend emerging in which "datarich" companies use this valuable and still largely untapped currency to help those in need. For instance, the U.S. Department of Health and Human Services has announced a partnership with Millennium Health, a drug testing company that is now donating data to the government to help fight the drug overdose crisis.

There's been a rise in the democratization of data in recent years, as people have realized that rather than have the unused data they've paid the fat-cat mobile companies for simply leach into the ether, they can recycle it for social good. This has led to the rise of the Data for Good movement. The 2016 #datadonate initiative from Swedish mobile operator Three—in which leftover data was turned into donations to benefit UNHCR's work in Syria—is seen as the vanguard of this emerging trend. In fact, the technology behind the effort has been released as an open-source solution for other mobile operators to use.

Most consumers are all for it: One University of Bristol survey found that over half of people would be happy to share their personal data as long as it's in service to society. As consumers become more aware of the value of their data and the exchanges they are making, we can expect to see them embrace one-to-one transactions in data donation to make a difference, too. As a result, data will enter the peer-to-peer sphere and follow a similar uptake to what P2P lending had in the mid-2000s. While companies rich in data will have greater scope to use their data on a larger scale, it will also be possible for everyday consumers to champion for good from the comfort of their living rooms.

5. FROM E-MESSAGING TO **D-MESSAGING**





Some 20 years in, electronic direct marketing is still the most cost-effective form of promotion for many organizations, but there's a newer tool in a brand's toolbox that offers much more immediacy, personal connection, effectiveness and value: mobile and social direct messaging.

DMs are the natural evolution of EDMs, and they are taking the marketing space by storm.

Prediction: Thanks to its personal feel and fun features, direct messaging will firmly cement its role in the marketing communications realm.

Messenger is the secondmost-popular iOS app of all time—behind its parent app, Facebook and it already hosts 20 billion business-to-

consumer messages each month. WhatsApp has even more global users at 1.6 billion vs. 1.3 billion for Messenger, and WeChat is right behind (and growing fast) with 1.1 billion. And many brands are just starting to explore the possibilities and new features offered by direct messaging across other social platforms such as Instagram, Twitter and LinkedIn.

Free messaging apps are continually making themselves stickier by expanding their services to include everything from hailing cabs to making payments. This provides an opportunity for marketers to make their messages even more seamless and effective. WhatsApp, for example, has a lot of untapped potential, offering free texting, voice messaging, file sharing and location sharing. It does not take ads, but now that it's topped 1 billion users (with a median age of 36), it is beginning to test new tools that help businesses reach out to consumers.

For simple functions such as answering questions and providing recommendations, DMs have long been a preferred mode of communication. But brands are beginning to understand the wealth of possibilities they hold for mass marketing as well. A quick DM can seamlessly push consumers to a chatbot and into a sales funnel. These bots are getting smarter by the year, and interacting with a

well-designed bot is quick, fun and convenient. Another advantage of chatbot software is that it lets the consumer direct the conversation. Some of the most effective uses of bots include quick surveys, instant ordering, subscription management and appointment scheduling. Integration with other apps—think navigation, calendar, camera—mean the possibilities are bounded only by the programmers' creativity. There are at least 100,000 chatbots on Messenger today.

DM apps also integrate seamlessly with payment capabilities, as well as games and shopping experiences. Adidas recently put these three tools to use, breaking new ground with the first Snapchat video game that let mobile users buy its shoes directly through the app. (Along with Dick's Sporting Goods, Adidas developed an eight-bit graphic game called "Baseball's Next Level," a home-run-derby-style game timed to coincide with the MLB playoffs and selling its audience a tied-in style of limited-edition cleats.)

In 2020, brands will find even more ways to surprise and delight as they explore new media and features. One to watch is Instagram's Threads photo-focused messaging app, which integrates with the platform's "Close Friends" list and has auto-sharing features designed to help users passively stay connected with their favorite contacts.

DMs have <u>wide acceptance</u>, a jaw-dropping open rate, and an immediacy unmatched by any other form of communication. They are an already-dominant marketing medium that is nevertheless just getting started.



The form of right-wing populism that has been exploding around the world—with the number of such national leaders more than doubling since the early 2000s—is not going away

Prediction: The continuing rise of populism will further coarsen online dialogue, putting brands in the uncomfortable position of having to choose a side.

anytime soon. Our own Al research tool confirmed before the 2016 U.S. presidential election that charisma and the ability to sound like "one of the people" (vs. one of the governing elite) had far

more influence over voters than their views on the candidates' policies, experience or intelligence.

The backlash against the perceived elite is so strong that these new populist leaders have made their careers on their ability to be the very opposite. They make childish attacks rather than reasoned arguments. They incite violence rather than trying to calm it. And they favor simplistic disinformation over the always-more-nuanced truth. In many cases—notably in the United States during Donald Trump's first term—this last is supported by efforts to undermine the institutions protecting free speech as #fakenews or "the enemy of the people."

Dominant technology players such as Facebook and Twitter play a role in post-truth politics, too, as they lean into the wider attention economy of their consumers. Their clicks-focused algorithms contribute to well-studied "echo-chambers" that limit the types and breadth of news people consume, causing them to find more support for their already-entrenched views.

And so with an attack style of communications in vogue, and objective truth becoming harder to discern, the internet will devolve further into a Wild West of tantrums, taunts and hair-trigger tempers.

That makes it a tough place to do business. While politicians are often rewarded for communicating recklessly or with guns blazing, it's a huge mistake for brands to assume they can do the same. We've seen that even relatively mild social media faux pas-like a juice brand playing at being suicidal, or a courier joking about shredding children's letters to Santa-face severe backlash.

In 2020, the marketers behind brand communications will be forced to articulate their own social and political values—i.e., "pick a side" - even at the risk of alienating customers. A few are already leading this charge: For example, several companies took action against Trump's executive order severely limiting immigration, with Starbucks pledging to hire 10,000 refugees. And when Trump insulted NFL players who were protesting police brutality, Nike responded by making the protest leader the new face of its advertising.

Of course, it makes no sense that juice companies and coffee shops should be held to higher standards of principles and dialogue than politicians, but our Havas Meaningful Brands study confirms that consumers now consider activism as important as a brand's practical benefits. For companies to succeed in 2020, they need to lead with a clear purpose.



Since we can't put our phones down anyway, it seems only natural that we've taken to strapping miniature versions to our bodies: Smartwatch ownership has reached 16 percent in the United States, fueled mostly by 18- to 34-year-olds. (The rate is 27 percent in the tech-happiest place

Prediction: As technology gets smaller, more capable and more integrated into our lives, various forms of wearables will become ubiquitous—and we'll also start seeing the rise of "insertables" and "ingestibles."

on earth, South Korea.) Fitness trackers are a variation on the theme, becoming more prevalent by the year as they gain new capabilities.

But anything that can connect to the internet and enable a data exchange has the capacity to

become a form of wearable tech. Here are just a few examples of what's already possible:

Breakthrough e-textiles can incorporate various trackers and sensors with no impact on the weight, feel, stretch or breathability of the fabric, making them more truly wearable than ever before. These smart-garments can monitor heart rate, pressure, movement, temperature and respiration in fitness applications; track key physiological or environmental data in healthcare applications; or provide communications, tracking, mobility, temperature sensing, and adaptable camouflage in military applications.

High-tech jewelry can monitor some of the same data as a fitness tracker, including step count, heart-rate detection and sleep monitoring. Depending on the device, these pretty little gadgets can also make payments, unlock doors, take selfies, make recordings, play music, track your period, receive phone alerts and monitor vour mood.

Smart contact lenses are already capable of monitoring the glucose levels in the tears of diabetics. Many companies are working on commercializing other applications, including augmented reality, autofocusing, thermal imaging (to help us see in the dark) and camera-like zooming capabilities.

Ingestible sensors have been able for some time to monitor pH levels in the body, temperature and adherence to medication. Recent new advances allow them to detect gastrointestinal bleeding and sample the gases present in the GI tract—both of which could be used to monitor for any number of diseases.

Speaking of getting under your skin, there are also smart devices that go in the mouth, nose and ears. And tiny chips that can be inserted under the skin provide a simple form of identification and tracking that can be used to securely open doors, store emergency contact information and transfer data to smartphones.

We've just begun to scratch the surface—so to speak—of what's possible, as sensors get more sophisticated, everything gets smaller and consumers get hungrier for creative new forms of quantified self-improvement. Wearables (and even ingestibles) could become the next performanceenhancing drug, helping athletes pace themselves with precision, optimize their strides or strokes, or perhaps even release helpful biochemicals at just the right time for a burst of energy. Functional jewelry could monitor our breathing and stress at work, and respond by adjusting the lighting and temperature in our home and putting on the perfect playlist to match or improve our mood.

It's also likely that insurers may start to encourage certain new kinds of trackers and wearables to detect health changes or potentially dangerous issues before people would have been aware of them, or that employers may provide wearables to workers to increase their health and wellnessor just to monitor their whereabouts, track their time at their tasks and ensure that they can be reached at any time.

All of this raises data privacy issues that are just beginning to be addressed, but in the meantime, consumers, especially the younger ones, love the convenience and fun features of wearable tech and seem increasingly willing to put it to use in any ways designers can dream up-on, around or inside the body.

8 COMING CLEAN





The days of athletes "sticking to sports" are behind us. Athletes and the brands that

Prediction: Sports-washing, or the practice of a country using sports to spiff up its image and/or conceal human-rights violations, will be in the media spotlight like never before. We expect to see sporting bodies, athletes and sponsors step up to stand for real change in 2020.

sponsor them have become inextricably linked to the most pressing socio-political issues of our time: human rights, racial inequality. LGBTQ rights and climate change, among others.

As teams and athletes have shifted toward social activism as a

brand identity, the practice of sports-washing has become magnified—and in the process it has become even more condemnable. We've seen this in Saudi Arabia, whose global image problem has been punctuated by its association with issues such as assassination of The Washington Post columnist Jamal Khashoggi and the torturing of women who have dared to protest the world's only ban on female drivers. Saudi rulers attached to these atrocities have tried to gain positive coverage in the form of business meetings with the NBA, MLB and Los Angeles Olympic Committee.

And this year, the Olympics will get another chance to elevate its own reputation after numerous scandals involving cheating and fraud. Contesting the perception that the World Anti-Doping Agency—a foundation initiated by the International Olympic Committee—has been too lax, it banned Russia from competing in the 2020 Summer Games and 2022 Winter Games due to several violations, including the manipulation of drug test results.

Indeed, sponsors are more cognizant of their affiliations than ever before. Particularly

damaging scandals and issues now lead to the immediate removal of sponsorship dollars with athletes, teams and leagues. As a result, sports teams are fighting back with stricter rules and swifter action around fraud, drugs and unseemly behavior.

Rising to the top requires more than just great on-field performance. It's about maintaining an outstanding brand reputation. We saw this trend play out in multiple instances in 2019, and it will continue in 2020.

Nike has gone all in with a marketing strategy that positions the company as socially progressive. Partnering with high-profile athletes such as Colin Kaepernick, Serena Williams and LeBron James, Nike has aligned with superstars who are known as much for speaking out on social justice issues as for their performances on the field or court.

In the meantime, Antonio Brown, former superstar wide receiver for the Pittsburgh Steelers, may never play in the NFL again due to the irreparable damage he's done to his career off the field, including criminal and sexual assault allegations and various Twitter outbursts.

The NBA found itself in a moral bind in China after Houston Rockets owner Daryl Morey tweeted and deleted his support for Hong Kong. His tweets forced NBA Commissioner Adam Silver to issue an apology to China, in an effort to protect the league's business ventures in the world's most populated country. This put the NBA, arguably the most progressive sports league, in the position of defending a country with a dubious human-rights record.



Prediction: More brands will revisit their core reason for being in order to communicate their credo—and live it—more effectively.

2019 was the year when many more companies began leading with value and values—not only offering more to consumers beyond the products they sell but also

making meaningful contributions to society at large. In 2020, we expect smart companies to take that even further.

Our Havas <u>Meaningful Brands Study</u> revealed that consumers wouldn't care if 77 percent of brands disappeared tomorrow. The loyalty enjoyed by the other 23 percent is about those brands having a well-defined purpose, acting on that purpose and tangibly weaving it into everything they do.

That study showed that 55 percent of consumers think brands have a more important role in creating a better future than governments, and that they will reward brands who want to make the world a better place.

Simply put, a purpose-driven brand is a successful brand. Those that live their purpose occupy a meaningful place in their customers' minds and catapult their growth.

Now is the time for brand strategists to start considering how they fit into the modern

world and what the point of it is. Ask some hard questions: What role does the brand play in customers' lives? How would the world be different without it? What does it stand for? What do its people believe in? How can it create value for consumers and build greater relevance?

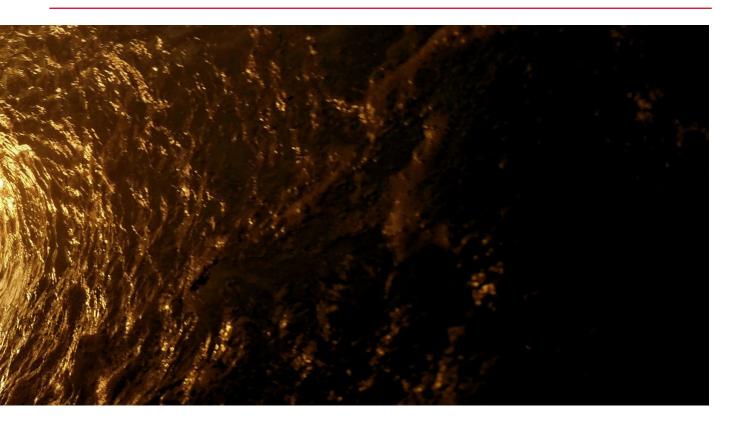
Questions like these will allow brands to rediscover their voice, their passion and their market point of difference—and in turn, to inspire emotional connections that lead to loyalty.

GoPro is one product that thinks beyond selling devices. Its stated value is to help people capture and share moments in their lives, so it has built strong platforms for users to share their video adventures and "pass on the stoke." This has resulted in thousands of #GoPro-tagged videos being uploaded to the internet daily.

Red Bull, too, is a standout in CSR, having launched two platforms that benefit social entrepreneurs driving positive change in their corner of the world as well as a foundation dedicated to finding a cure for spinal cord injury.

Social causes, even politically charged ones, are another important way to grow relevance. Even though a majority of <u>CEOs say they are</u>





wary of wading into political waters, brands can benefit from taking a thoughtful and authentic position. Consumers want companies to stand up for the causes they are passionate about. They will rally behind brands like Ben & Jerry's, which has used ice-cream-based stunts to stand up for LGBTQ rights.

There is a consumer for even the most niche business to thrive, and brands now have the ability to market directly to those people. That means there's no need to appeal to everyone, and trying to do so will only water down the message. It's more important—and more fun to be fantastic for a few rather than acceptable to almost everyone.

10 READY FOR LIFTOFF



Is it possible for something as old as time to "trend"? Apparently. Though outer space has long captured our imaginations, its potential as a brand of its own has been as of yet untapped. Now, however, the stars have aligned for space to take up a lot of space in current events, pop culture and merchandising.

There's plenty of official space business on the horizon: In addition to an assortment of space missions on the calendar over the next

Prediction: Outer space, the most majestic and undiscovered realm of all, will evolve into a brand of its own. few years and decades, Japan is all set to build a \$2 billion <u>robotic moon</u> base in 2020. And some 50 years after Apollo 11 landed on the moon. NASA will once more

send a living organism to space. This time it's packing a spacecraft with yeast rather than astronauts to test the effect of deep-space radiation on DNA and DNA repair.

Exploiting the romance of space travel, Yusaku Maezawa, a Japanese billionaire with tickets for the SpaceX moon mission, is taking applications for a plus-one to accompany him on the trip—and in life.

Space continues to inspire incredible technological leaps and will soon open up a whole new travel market for those bored with the current options, which have been Instagrammed to death. Space tourism is taking off, thanks to the billions that have been poured into space exploration initiatives by venture funds and billionaires like Richard Branson, Jeff Bezos and Elon Musk, Branson's Virgin Galactic will start its commercial flights in late 2020, as will Blue Origin, which is being backed by Amazon. Blue Origin is also collaborating with Lockheed Martin, Northrop Grumman and Draper in an attempt to build a lunar landing system to meet the U.S. government's goal of taking humans to the moon once more.

By 2024, the space tourism market is expected to be worth \$1.18 billion. Speaking of money, space tourism requires a lot of it. A trip to the

International Space Station will cost around \$35,000 per day, while a return ticket will cost around \$60 million.

Meanwhile, here on earth, the starry-eyed among us can still get their (more affordable) fix. We can expect space to become a greater part of pop culture—not just in movies but in beauty, fashion, design and music industries, as all come on board with space-inspired products. Think space bars, space drinks, space fashion and space furniture. Beauty brands like Milk Makeup and Glamglow have already used mineral-rich meteorite powder in their products. We'd bet good money that people would be more willing to buy a product if it was inspired by technology developed for or in space. On Pinterest, folks have been especially busy pinning astrology-themed parties, space tattoos, constellation piercing, galaxy painting, intergalactic makeup and clothing with the NASA logo. The platform recommends that brands play into astrology's rise in popularity with "What's your sign?" product lines or menus.

Look, too, for satellites to be increasingly used for all sorts of marketing and environmental purposes. We're now using images and video from space to show infrastructure development or environmental damage such as the wildfires in Australia and New Zealand.

What's clear is that we cannot use space exploration as an escape hatch so that we don't have to confront what we've done on our own planet. (Though there is a growing amount of debris out there, too, the result of decades of experiments, government testing and collisions.) We should pay just as much attention to retaining life here and not repeating our mistakes in the next frontier.

Because space is borderless and countryagnostic, part of its beauty is its ability to unite people from around the world in a common quest for adventure and for what's beyond. In a time of great political polarity, the power of space to unite and ignite our imaginations may be more valuable than ever.

UNBLINKERED THINKING UNEXPECTED IDEAS

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