



MOXIE PRESENTS

2020 SOCIAL TRENDS FORECAST



2019 YEAR IN REVIEW

As we gear up to celebrate social media's sweet sixteen, we also can't help but reflect on the social happenings from this past year. And it's more important than ever because for the first time, time spent on social media did not increase.

We saw QSRs battle over chicken sandwiches, and we followed along with an Instagram engagement proposal. Brands that were up for an adventure traveled to Area 51, and we all had #GameofThrones fever. If you don't know what a VSCO girl or eBoy/eGirl is yet, start Googling.

Despite foreign privacy concerns, many of us downloaded TikTok (and posted a challenge or two). Twitter banned political ads just in time for an election year, and all of our eyes were on Zuckerberg and Facebook's data privacy policies – or lack thereof.

Don't think the new decade can top this one? OK, Boomer.

Here's what you can expect...

2020 TRENDS: THE ELITE 8

- 1 Social Isn't Just Paid, Owned or Earned; It's Shared
- 2 Your Social Feed: Aspiring Safe Space
- 3 Content in a Complex Climate
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**SOCIAL ISN'T JUST
PAID, OWNED OR
EARNED; IT'S SHARED**

1 SOCIAL ISN'T JUST PAID, OWNED OR EARNED; IT'S SHARED

When it comes to social, using the word social is *so last decade*.

What likely comes to mind when someone says “social media” is Facebook, Twitter or Instagram. For brands, that’s really limiting. Today’s users aren’t spending as much time visiting brands’ Facebook pages or Instagram profiles. Therefore, these owned channels don’t hold as much value anymore. The majority of social interactions are happening in the feed, and the feed isn’t just paid, owned or earned – it’s shared.

That’s why it’s time to think of social in terms of “shared spaces.”

Those shared spaces include the groups, newsfeeds and online watering holes where people come together to interact and exchange information. And those spaces are governed by the actions of consumers’ behaviors. By thinking of it in this way, we expand the channels in which we begin to market to consumers in social.

Think about TikTok, Venmo, Reddit and Twitch – all shared spaces that are very different, but still where consumers are coming together to exchange information and interact around shared interests.

For brands to stay relevant, they need to think about their audience(s) and niche interests. This identification will help to shift efforts to the shared spaces (and watering holes) where their consumers are already spending time.

The internet has **4.4 billion users**

There are **3.499 billion active**
social media users

On average, people have **7.6**
social media accounts

Social media accounts for only **2**
out of the top 15 digital properties
(Facebook, Twitter)



YOUR SOCIAL FEED: ASPIRING SAFE SPACE

2 YOUR SOCIAL FEED: ASPIRING SAFE SPACE

More than half of teens report being a victim of online trolling and bullying. Who's to blame? You might guess other students, parents or social media itself. Surprisingly, teens point the blame at themselves.

There have been two consequences to this fact. One is that platforms like Facebook, Twitter, Instagram and TikTok have made changes to decrease bullying and safeguard the mental health of their users. Two, teens have also started to monitor time spent on social, thanks to iPhone features and third-party time-tracking apps.

As the conversation about mental health becomes more open, social media users have become more aware of potential negative effects of excessive screen time. Those users are taking proactive steps to protect their own mental health.

And this is one of the contributing factors why 2019 marked the first year that time on social did not increase, and we predict 2020 will be no different. So what's a brand to do? First, be a part of the solution and not the problem; publish meaningful content that fosters authentic connection and protects the feed as a safe space. Second, recognize how platform changes can and will affect future reporting and future metrics.

Platforms making a change: Facebook, Instagram and Pinterest

59% of US teens have been bullied or harassed online

Conversations using the phrase “well-being” or “self-care” **increased 225%** since 2016

54% say they spend too much time glued to their phones, and **52% are proactively trying to limit overall screen time**

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CONTENT IN A COMPLEX CLIMATE

3 CONTENT IN A COMPLEX CLIMATE

No 2020 report would be complete without mentioning the upcoming presidential election. The election has, of course, already started to impact the social feed (see: [Twitter banning political ads](#)) and social spend.

This year, an unprecedented amount of money will be spent on social ads promoting political candidates, some predicting as much as \$1.2 billion. Layer in the Olympics, and advertisers can expect higher-than-ever rates for their social budgets.

Regardless of how these two events affect spend and budgets, brands can also expect them to impact the resonance and relevance of upcoming campaigns.

As marketers plan for 2020, consider the company your ads will be surrounded by. The feed will be cluttered with contentious, possibly polarizing political messages, and/or heartwarming stories of athletes.

In order for social efforts to be successful, brands should include this context in both creative and campaign briefs. Brands don't have to address the election outright, but they do need to acknowledge the cultural climate of social in 2020.

Campaign budgets will reach between \$6-10 billion this year, which is a **60% increase over 2016**

In 2019, Democratic candidates spent **\$32M on Facebook** ads alone

Advertisers will spend close to **\$3B** to be associated with the Olympics

Advertisers expect a **20% increase** in digital ad budgets for 2020



**DEDICATED VOICE,
DEDICATED FOLLOWING**

4 DEDICATED VOICE, DEDICATED FOLLOWING

Brands and individuals alike will have to compete more than ever for online attention in 2020 (see previous trend), and memes alone won't win the race.

The number one reason users follow brands on social media is to be entertained, and the brands that do this most successfully have a distinct and consistent social tone of voice (STOV). A strong STOV helps brands choose which conversations to participate in – and which ones to stay out of – and makes their content more relatable.

Brands with a developed STOV successfully elevate platform trends and behaviors and gain unaided awareness by loyal followers and new fans alike. Brands like [Popeyes](#), [Wendy's](#) and [Steak-umm](#) built passionate fan bases through commitment to STOV.

In Twitter's report on the state of brands in 2019, it lists the two most reliable ways for brands to avoid sounding too corporate: "self-awareness and self-deprecation." This has been described as "[cosplaying personhood](#)" and embodies a new wave of brands talking like people. The vernacular we use and subjects we talk about are a reflection of who we are at our core, and companies on social are most successful when they adopt these behaviors.

A clear social tone of voice will be the differentiator and driver of social strategies in 2020 by creating communities and establishing opportunities for brands to rise above the noise.

48% of all people follow brands on social media to be entertained

50% of marketers agree that entertaining posts are more effective than posts about discounts and sales

Wendy's National Roast Day resulted in more than **100 million earned media impressions** and a **737% increase** in brand mentions

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TIME TO RECOGNIZE THE GENFLUENCE

5 TIME TO RECOGNIZE THE GENFLUENCE

Millennials, grab a cold brew coffee and take a backseat because it's time for other generations to step into the spotlight.

While social media marketers have been largely focused on Millennials, they're now shifting their focus to two other impactful demographics – Gen Z and Baby Boomers. While these groups use social and the internet very differently, there is no doubt that both generations will have a significant influence in the upcoming year. Let's start with Gen Z.

This large-and-in-charge generation entered the workforce in 2019 and brought money, opinions and clout with them. This clout resulted in them influencing other generations; key areas of influence include social media usage, environmental and political issues, the cancellation of cancel culture and inclusivity overall. Even if we don't all download TikTok, we won't be able to overlook Gen Z any longer.

Gen Z isn't going to be alone in the spotlight in 2020 – Boomers (adults 50+) are the fastest growing demographic on social. What initially started as a way to keep up with old friends and younger family members has now evolved into proactive participation in content creation. Enter the Granfluencer (like Iris Apfel), an emerging type of influencer who has just as much style and social savvy as their younger counterparts. This older generation of social users is forcing us to rethink our outlook on who holds sway on social media.

Both the older and younger generations have clear preferences on what they want to see on social, and brands will have to adapt in order to resonate with either audience.

Social media usage by adults 65+ jumped from 12% in 2011 to **40% in 2019**

The share of older Americans who use Facebook has more than doubled since 2012

50% of Gen Z think social media is the most relevant channel for ads



**LET'S REDEFINE
CONNECTED COMMERCE**

6 LET'S REDEFINE CONNECTED COMMERCE

Back in the day, when you wanted to buy something you went to traditional retailer's website or – *gasp!* – their brick-and-mortar store.

Those days aren't aren't completely over, but with the increased adoption of social commerce and mapping of our social graph, a new form of shopping swept through 2019: shopping from your social media connections, or *connected commerce*.

The ties between buyer and seller have become closer, more complex and more social, especially with the arrival of DTC brands in our feeds (like [Casper](#) and [Glossier](#)). While social commerce has caught on slowly, the takeoff of recommerce has been more like a new Tesla going from 0 to 60 in two seconds.

The popularity of recommerce is likely driven by Marie Kondo and an increased focus on sustainability, and made possible by the growing digital marketplace. Look to the meteoric rise of sites like [Depop](#), [thredUP](#) and [Poshmark](#) for further proof. If you're still unconvinced, scroll through your own feed. Influencers and "regular" users alike have taken to the 'gram to clean out their closets or flock to online marketplaces like [@noihsaf.bazaar](#) or [@gs__bs](#).

Brands should take note as Gen Z steps into the marketplace with an analytical mindset and a resistance to paying full price. Now is the time for marketers to match the thorough mindset of consumers, who are no longer clicking "add to cart" at the first thing that strikes their fancy. Brands should also consider touting the second life of their products, especially in fashion, and potentially even get in on the game themselves. If you can't beat 'em join 'em, right?

The resale market has grown **21x faster** than the overall retail market over the past three years

27% of consumers are now shopping through social

Resale was a **\$24 billion** market in 2018



**TO SPONSOR OR
NOT TO SPONSOR?**

7 TO SPONSOR OR NOT TO SPONSOR?

In 2019, we saw influencer marketing take over the cultural conversation more than ever before (remember that viral [Instagram proposal?](#)). Along with this cultural conversation came a shift in the expectations surrounding influencers and their place in the social landscape.

There has been an almost 300% increase in Instagram content containing #ad, #sponsored or #spon since 2016. The products and services being promoted by influencers are no longer limited to beauty and fashion; more off-the-wall sponsorships have included pregnancy announcements, purchasing a home and plastic surgery procedures.

Sponsored life moments are starting to make their way to the timeline, presenting a unique opportunity for unexpected brands to work with influencers.

As the influencer market grows, so has concern and criticism over what is appropriate for paid promotion. For example, influencers have been offered money to post sponsored content in support of 2020 presidential candidates. While there are existing policies for political advertising and transparency, influencer marketing presents more of a gray area, and people are now questioning the moments that should be off-limits.

When planning influencer campaigns for 2020, marketers will need to determine what scenarios and messages are off-limits for their brands.

48% of marketers invest in influencer marketing

Brands expect to spend **\$15 billion** on influencers by 2022

During the IG proposal, @fashionambitionist gained **40k followers**



INTRODUCING B2E SOCIAL MARKETING

8 INTRODUCING B2E SOCIAL MARKETING

When it comes to social media marketing, B2C and B2B are established verticals. What people aren't talking about yet is B2E, or Business to Employees (team members, associates, partners, etc.).

Of course, corporate communications have been around forever but have been reluctant to modernize. Moving forward, it will be more of a priority as more employees (43% of US workers) are working remotely. The traditional channels and even internal social channels, of the likes of [Yammer](#), have historically been used to reach employees will need to evolve as well.

The increase in remote employees has created a phenomenon called "social distance."

Social distance is the equivalent of workplace FOMO. This particular brand of FOMO can have consequences more serious than seeing your friends posting at a party without you. The business ramifications of social distance can include decreased productivity, a dive in engagement and an increase in turnover.

Enter social media, which can help shore up the social distance between coworkers and teams. In past years, social media was deemed a workplace distraction, but when used effectively it can be a powerful tool for engagement and efficiency (often more powerful than email).

Brands like [L'Oreal](#), [Starbucks](#) and [Marriott](#) have successfully used inherent social behaviors, templates and platforms to reach employees in meaningful ways. B2E social marketing is an opportunity for brands to extend their existing social expertise to reach an untapped audience that has inherent value for their business.

60% of organizations never deploy any strategic corporate communications

Implementation of a social program or social-like tool can improve employee productivity **by 25%**

Organizations with engaged employees experience **20% in profit increase**

2020 SUMMARY

For brands to be relevant and rise above the social clutter in 2020, they have to understand their audience (like the ones that are on a mission to save the turtles) and speak to them in the right style (save the press releases for the press) and in the shared spaces (Zuck dominates a lot but not everything) that are relevant to them. And while all this has been true since the inception of social media, this is not a subtweet so pay close attention; it's more important than ever, given the new ways people are using social and the cultural climate of the upcoming year.

THANK YOU.

MOXIE

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