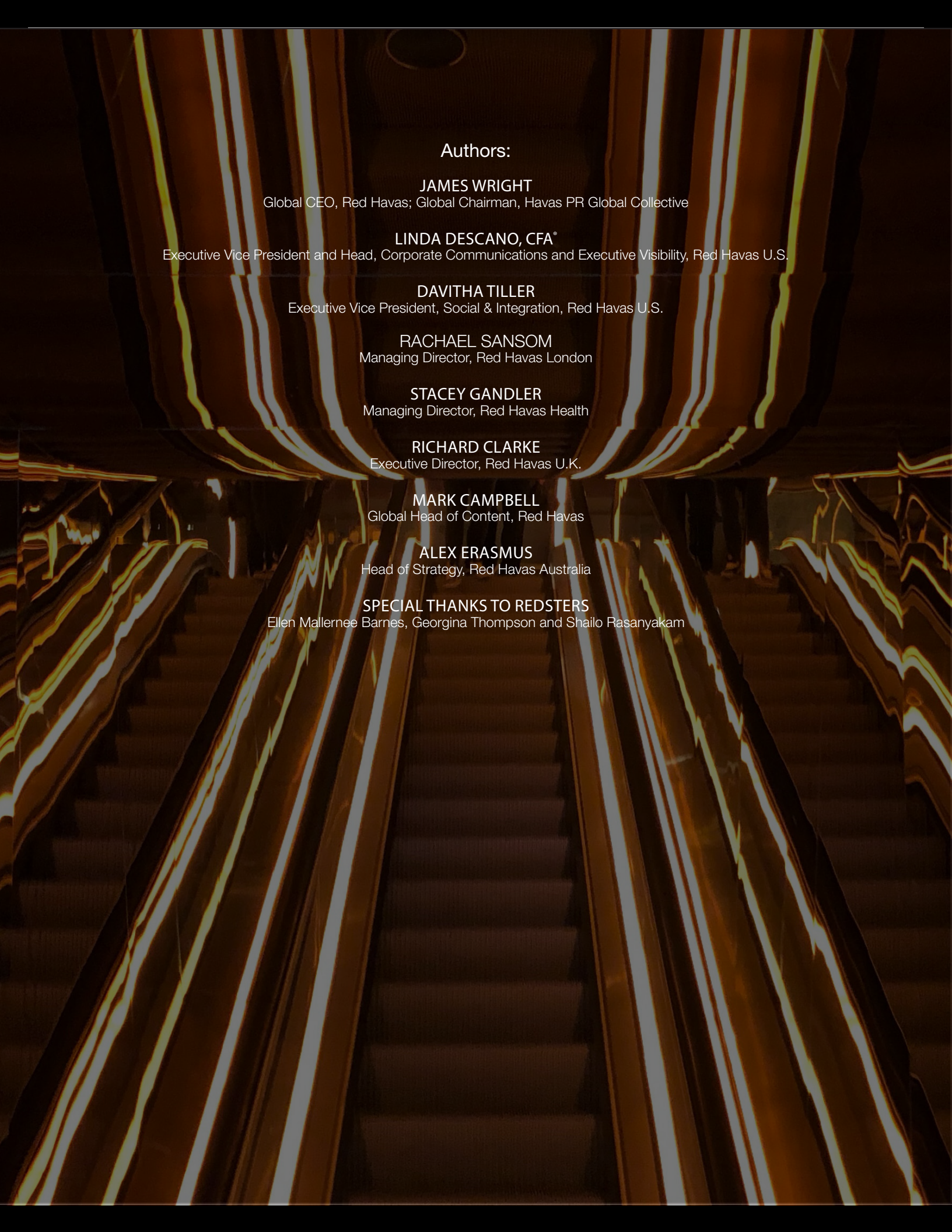

RED SKY PREDICTIONS 2021

10 PREDICTIONS FOR COMMUNICATORS IN 2021



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RED SKY

PREDICTIONS

2021

2020 sent a resounding message about how much control we wield over our own lives: VERY LITTLE. As it turns out, even the best-laid plans fly out the window when a crisis comes knocking—or crashing through the front door, in the case of a global pandemic. That's why our overarching prediction for 2021 is how vastly unpredictable this year stands to be.

Yet, even as we continue to face some harrowing unknowns, the lessons we've learned have fortified us and future generations. The brave pivots of individuals, organizations, industries and governments around the globe have shown us that agility and resilience are the insurance we need to press forward, that nothing matters if we don't have our health—and one another. Even while many of us stayed home, life did not stand still. Across the digital and social media space, healthcare and technology, the workplace and travel, the trends forecast in previous editions of Red Sky Predictions accelerated at light speed. Nascent technologies and innovations got up and running. New industries lurched to life while others came apart. With the bubble of our perceived invincibility burst, we've been able to see more clearly what's possible, what's vulnerable and what we stand to lose.

We invite you to explore Red Havas'10 predictions for communicators in 2021, and within them the lessons we learned from the year we surrendered to the present instead of trying to control the future.

1.

CONTACTLESS COMMUNICATIONS

Pandemic flips the roles of the virtual and the personal

In 2020, the combination of lockdowns, shutdowns and quarantines resulted in a massive, sudden shift to remote work, remote learning, remote workouts, remote healthcare—and even remote family and friends.

Even when we could see one another in person, customary warm greetings like handshakes, hugs and double cheek kisses fell by the wayside in favor of elbow bumps, waves and bows. And the masks we've all been wearing have made in-person interactions that much more difficult: More than 90% of communication is nonverbal, and we tend to trust nonverbal communication over verbal language. Masks not only muffle our words and make it impossible to read lips, but they also hinder our understanding of facial expressions and our ability to detect other people's feelings.

In many cases, the pandemic has reversed the role of face-to-face versus online experiences. In-person interactions, whether at work or in stores, have become brief and transactional, while videochatting is now our go-to destination for more meaningful engagement and relationship-building.

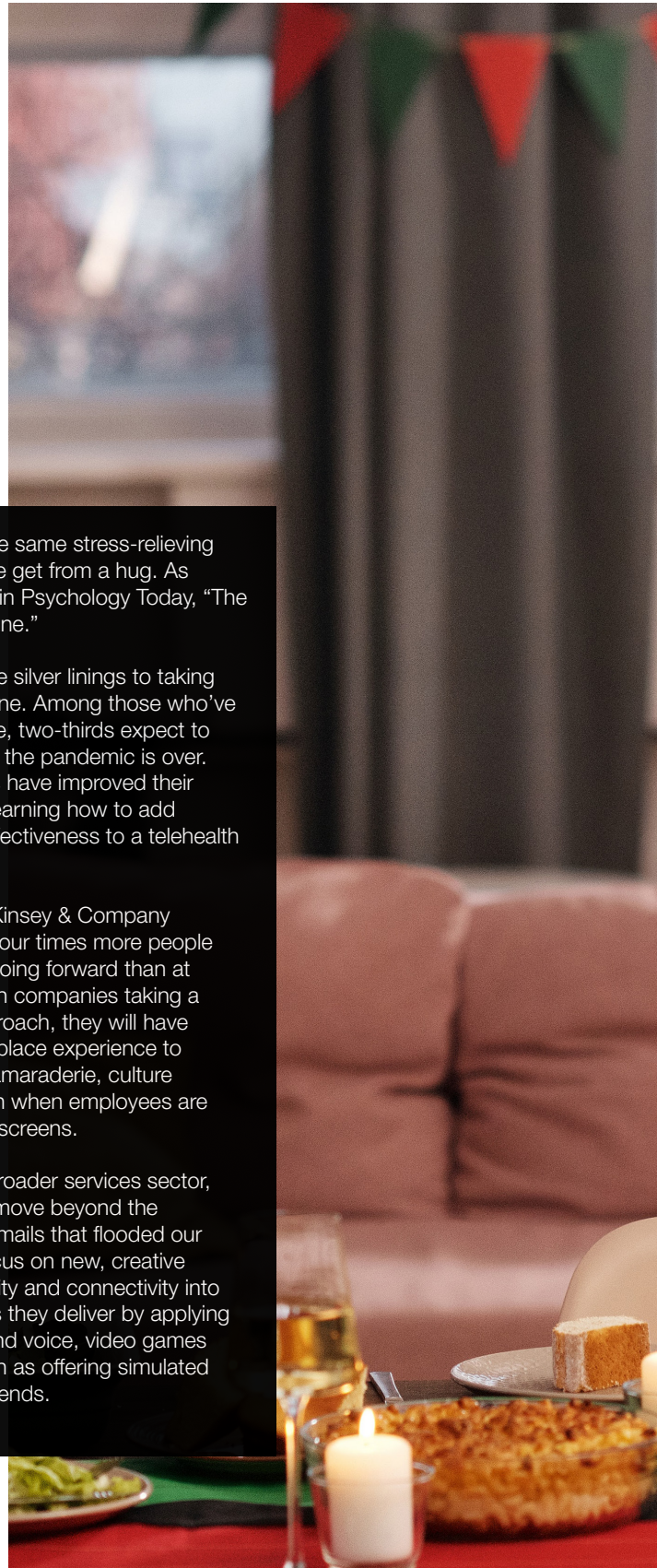
These virtual interactions have helped us stay connected and sane. Hearing the voice of a

loved one activates the same stress-relieving brain functions that we get from a hug. As Bruce Grierson wrote in *Psychology Today*, "The human voice is medicine."

There have been some silver linings to taking more experiences online. Among those who've used telehealth service, two-thirds expect to continue using it once the pandemic is over. In response, providers have improved their "webside manner"—learning how to add warmth, clarity and effectiveness to a telehealth visit.

In the workplace, McKinsey & Company expects that three to four times more people will work from home going forward than at pre-COVID levels. With companies taking a location-agnostic approach, they will have to reimagine the workplace experience to cultivate a sense of camaraderie, culture and collaboration even when employees are interacting in 2D over screens.

Within retail and the broader services sector, we expect brands to move beyond the marketing texts and emails that flooded our inboxes in 2020 to focus on new, creative ways to infuse humanity and connectivity into the virtual experiences they deliver by applying the technologies behind voice, video games and even Zoom—such as offering simulated shopping days with friends.





Prediction: Expect the future to remain “phyrtual”—a blend of physical and ever-more-satisfying virtual. Once vaccines have been administered to the masses, we’ll get to cherry-pick the things we liked about the lockdown life—i.e., the ease of virtual baby showers or the perks of our work-from-home arrangement—while we give the others a big kiss goodbye.

“We need voice more than ever. Humans get lonely when they don’t hear other human voices.”

—actor Tod Fennell, as told to Forbes

2.

THE COMEBACK OF COMMUNITY

A season of physical isolation breathes new life into social

When social media first hit the scene, it served as a channel for community networking. From Facebook connecting the college campus to LinkedIn bringing your professional contacts under one online roof, our primary reason for using social media was to get and stay in touch with our connections.

However, over the years and with the introduction of the newsfeed and algorithms as common practice across platforms, we saw social make the shift from grassroots community networking tool to full-blown—and often branded—broadcasting platform used more for content consumption and less often for intimate connections.

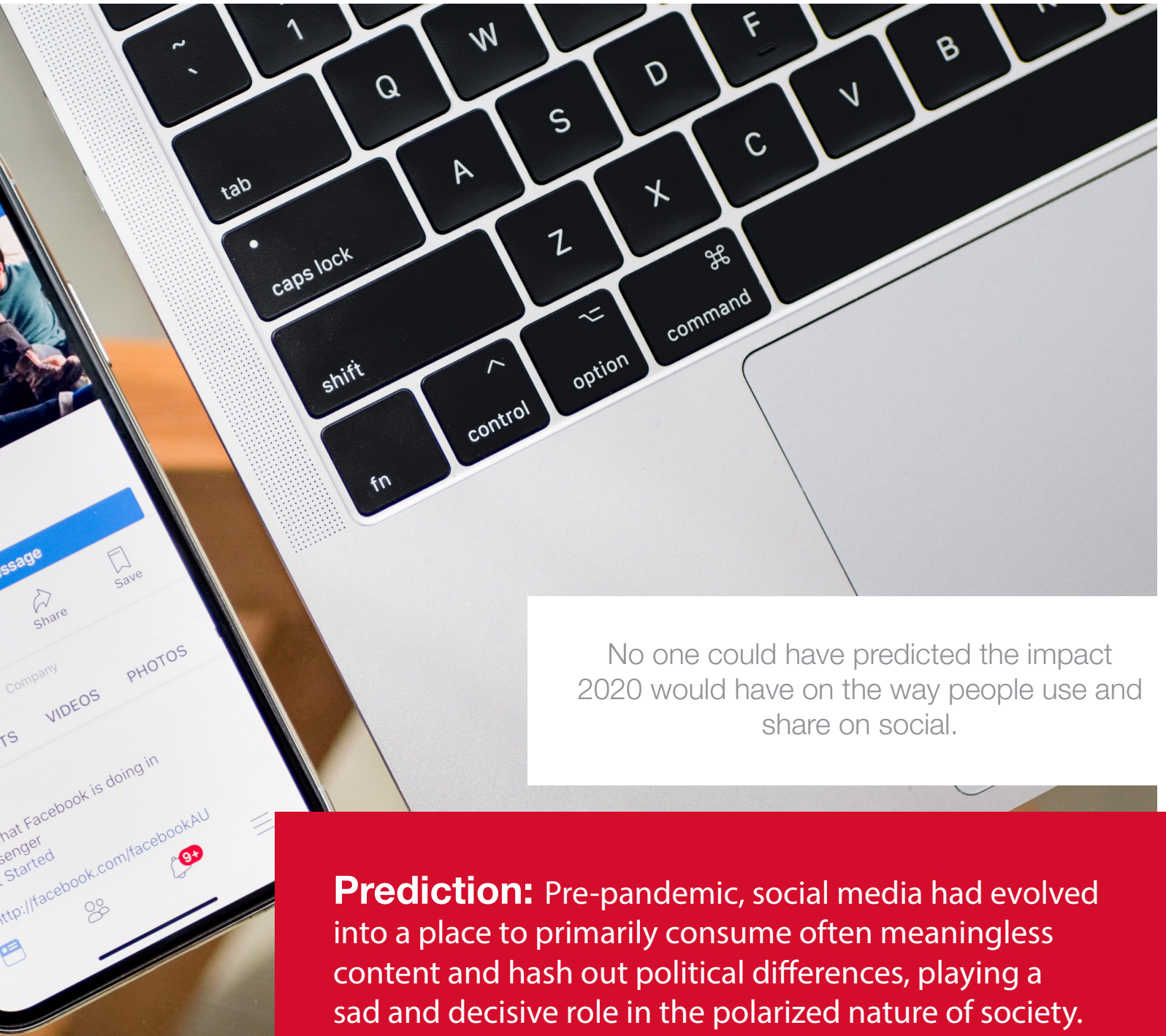
That shift from active to passive engagement—conversations and comments versus likes and views—became so significant that it caused Facebook to considerably alter its algorithm back in 2018 to prioritize valuable content from people you care about over branded content in aiming to increase personal connections. In 2019, Facebook further encouraged personal connection and engagement through

its increased focus on and promotion of the Groups functionality, which allows users to create public, closed and secret Groups for any number of purposes.

No one could have predicted the impact 2020 would have on the way people use and share on social. With COVID lockdowns putting an end to parties, concerts and other entertainment, social media has come full circle as a source for connection, interaction and amusement. This explains the meteoric rise of TikTok, which provided an easy-to-use platform to give the pandemic-crazed population a creative outlet for the song and dance suddenly missing from everyone's lives. The pandemic also paved the way for the entry of Clubhouse, an audio-based social network that launched in March 2020. With private and public conversation rooms that can accommodate as many as 5,000 people, the app now counts Elon Musk, Drake, Ashton Kutcher, Mark Zuckerberg and 6 million others as users.

During the pandemic, “back to social basics” formats such as Groups also came to provide a vital link to our local communities and people with shared interests—and in many cases were the only thing keeping people on Facebook at all.





No one could have predicted the impact 2020 would have on the way people use and share on social.

Prediction: Pre-pandemic, social media had evolved into a place to primarily consume often meaningless content and hash out political differences, playing a sad and decisive role in the polarized nature of society. Now, in spite of concerns about the implications on free speech, it's made a return to its original purpose—human connection—and will enjoy a new golden age of conversation and community-building.

3.


IN COMES THE VACCINFLUENCER

The vaccine rollout calls influencers and brand marketers to action—and everyone is watching

The pandemic immediately threw a wrench in the traditional influencer model, making parties, vacations and all other picture-perfect gatherings taboo. Now those influencers who've refused to comply with social distancing measures and travel restrictions are being held accountable on the very platforms where they made a name for themselves. On the Instagram account @gaysovercovid, which has amassed nearly 150,000 followers, a group of gay men are using the account to “name and shame” fellow gays who have continued to party and travel in spite of the pandemic. Whether or not these meme accounts are harmful or helpful—there's plenty of debate about that—they speak volumes about what the next chapter of brand and influencer marketing holds.

Today's influencers are being called to take a stance on and “cover” the COVID vaccination in their content, as are celebrity spokespeople. This is something brands will have to consider carefully when determining who they work with—not unlike vetting American influencers prior to the U.S. election on how they were addressing politics. British pop star Rita Ora, for example, was recently dropped as the face of the latest EE and Apple campaign after two separate instances of breaching lockdown protocol. “The guilt and shame I've carried this week for my mistake aren't worth it,” she said in a statement. “Instead, continue to listen to the government advice and the voices of the heroes of the NHS and take the required precautions.”

Speaking of Britain's National Health Service, it's reportedly mulling bringing in influencers to persuade the nation to take the vaccine. And in the U.S., the nonprofit Ad Council is spearheading a \$50 million campaign to educate Americans on the vaccine. Indeed, the introduction and distribution of the vaccine are giving rise to a new type of health influencer. The vaccinfluencer will speak to the do's and don'ts—mostly do's—related to the vaccine. For example, doctors will hit up channels like TikTok to connect with audiences and proactively correct misinformation. And even individuals with humble social followings will be urged to share images of themselves getting vaccinated to encourage others to do the same, akin to the mass sharing of “I VOTED” stickers on social.



“As influencers share their vaccinations on traditional and social media, virtually everyone unsure about getting a Covid-19 vaccine will see someone they admire getting it. The line for people wanting a Covid-19 vaccine will grow.”

—Alan Levine, technology executive for Wright Williams & Kelly, as told to STAT

Prediction: “Get out and get the vaccine” is the new “Get out and vote” for influencers, as they’re being called upon to help lead society to the other side of the global healthcare crisis. Much like influencers were a force for good in the early days of the pandemic—encouraging people to stay home, wash their hands and thank healthcare workers—“vaccinfluencers” will be expected to demonstrate continued safe behaviors, spread public health information and encourage mass vaccination.

4.

SHORT FORM, LONG FORM, NEW FORM

It's time to define new forms of content by their function, not their length


If imitation is the sincerest form of flattery, Snap should be tickled fuchsia that its Stories feature has now been shamelessly emulated by all the major social media players—first Instagram, then Facebook and YouTube, then LinkedIn, Pinterest and even Spotify. All the while, copycat cousins of a variety of content types have proliferated in the social space. See the popularity of audio and podcast content, numerous options for livestreaming social video, and how IGTV and Facebook Watch were introduced to compete with YouTube's high-quality edited videos, or how Instagram Reels is a blatant rip-off of TikTok's quick, mobile-only videos.

With so many formats now at our fingertips across platforms, marketers can no longer define content as "short-form" or "long-form." If it must be classified at all, it should be classified by its purpose. What we should be exploring, for example, are new forms of content such as playable content, tappable content, scrollable content, audible content and shoppable content. In December, for example, Walmart piloted in-app, livestreaming shopping on TikTok. While it's unclear how many people tuned in to the broadcast, video clips posted to Twitter showed that least 13,000 users were watching simultaneously.

Regardless of duration, and therefore the time needed to invest in it, what matters is whether or not a piece of content is any good, on the consumers' terms and optimized for the channels they're accessing it on. In acknowledgment of this, many of the hard-and-fast rules we espoused as best practice not so long ago—e.g., "design for sound off" or "long-form video lives on YouTube"—now require a more nuanced understanding of how consumers are adapting their engagement behaviors to each format. A prime example: Video in the feed is primarily viewed with audio off, while Stories are most often viewed with audio on.

These days, it's the rule-breakers in the social space who are shaping up to be the real savants. For instance, the New York Public Library tore up the supposed Instagram rulebook with its Insta Novels series. Our hats are off to the hallowed institute for having the gumption to ignore the conventional "snackable content only" pigeonhole that Instagram has been put in. Instead, it published classic novels—full length—on the channel. And Screen Australia has partnered with TikTok to fund a long-form narrative story, "Scattered," that's being sliced and diced into 38 one-minute episodes. So, rather than thinking about creating cupcake content for TikTok, think about how to carve wedding cake-sized content into smaller slices for audiences to snack or binge their way through.





Prediction: As the “traditional” rules of content creation lose relevance due to new and disruptive formats, marketers around the globe will go from prioritizing content length and duration to thinking with end goal and experience in mind. Their focus will turn to how they can frame content to fit different channels and formats without being beholden to the supposed limitations of each.

Consumers don’t speak or think in terms of long- or short-form content, and they never have. Let’s imagine Shakespeare had been asked to cut “Othello” down to a single act because “it’s all the kids are up for nowadays.” Shakespeare’s 14-line sonnets remain as treasured as Milton’s 10,000-plus-line “Paradise Lost.”

5.

THE 5G FACTOR

How does a pop star in your pocket sound?

While many thought the fifth generation of wireless communications technology, otherwise known as “5G,” was our future, COVID accelerated its need into the present and highlighted its crucial role in battling the virus. As a result of 5G networks, robotic and remote surgical procedures can now be a reality. Not only that, but 5G is changing the way people live and work. It’s powering contact tracing and telemedicine while supporting virtual learning and e-business as many companies have shifted into remote work and relied heavily on digital communications.

5G’s cutting-edge technology isn’t just about speed; it’s also about being able to interface with multiple devices simultaneously, from a self-driving vehicle to a home appliance to a smartphone or even an electric toothbrush. As such, countries and companies are racing to have the fastest or largest network, competing to be the first to deploy fully functional and nationwide 5G. At the same time, they must face down persistent concerns about 5G’s invasiveness and conspiracy theories that link the technology to everything from the spread of COVID to a condition called electromagnetic hypersensitivity.

Most consumers, however, are clamoring to gain access to 5G, credited with making the iPhone 12 the quickest-selling iPhone of all time. With smartphones now serving as a digital home to many, 5G has opened the floodgates for marketers. The technology will change how brands communicate with their customers, while also allowing greater data capture—particularly in relation to individuals’ activities and locations—meaning even better ad targeting, personalization and relevance.

We’ll also enjoy plenty of opportunities to engage and entertain consumers via 5G, even if we must first suffer through some clunky initial attempts. When Verizon recently trotted out its 5G capabilities with an augmented reality, gamified version of New York’s Metropolitan Museum of Art, for example, some reviewers were unimpressed.

The technology’s true potential is still a work in progress, but as Verizon Chairman and CEO Hans Vestberg said, 5G is “an innovation platform that makes other innovations possible. It’s the platform for us to build the future we want.”



Prediction: 5G has the potential to transform the digital experiences that marketers can create in the virtual world. Merging the realities of physical and virtual, 5G-enabled mobile technology will enable marketers to create live, lifelike, immersive experiences of concerts, sports events and much more.



“The time has come for businesses, public authorities and citizens to question the challenges, opportunities, vices and virtues of the widespread digitization of society. The deployment of 5G is part of this process and represents both a new challenge and an opportunity for societal progress.”

—Tchéhouali Destiny, International Communications Professor at Université du Québec à Montréal (UQAM)

6.

THE RISE OF THE EMPOWERED EMPLOYEE

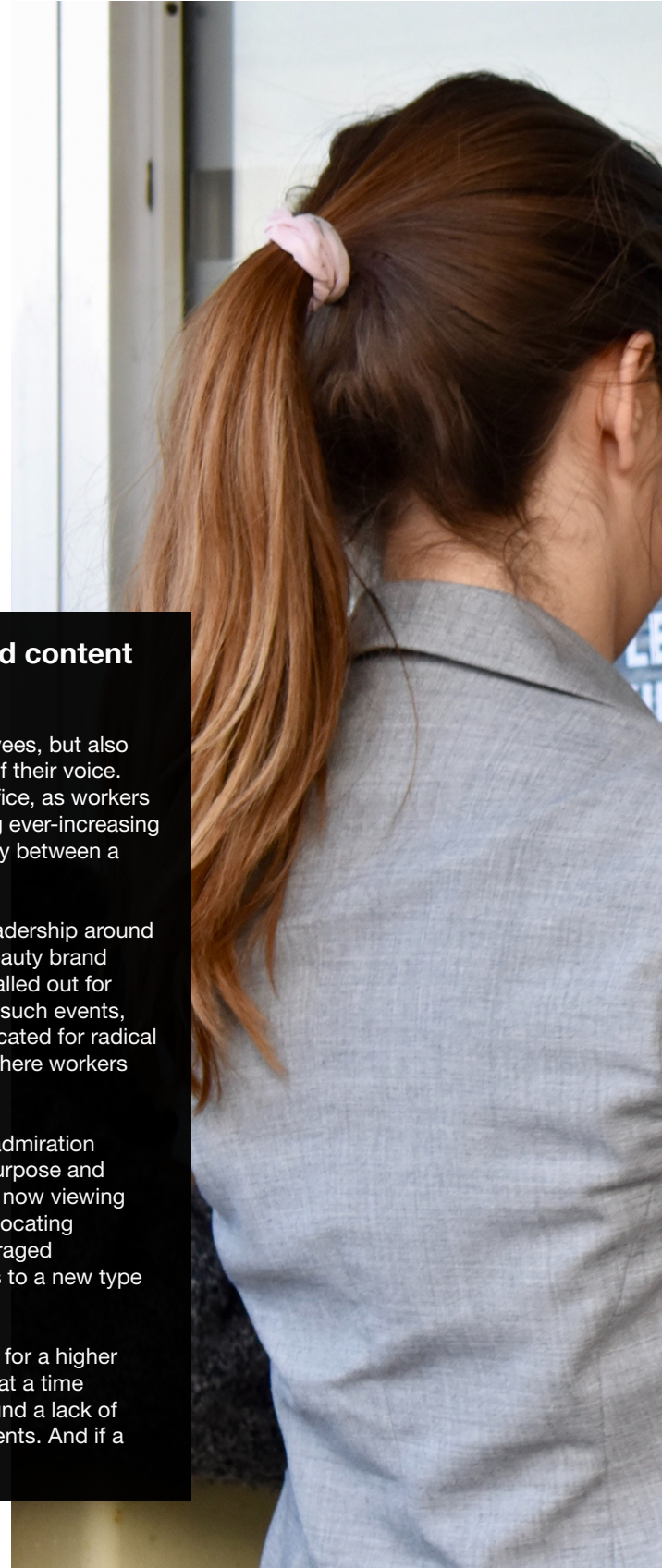
Harnessing the potential of employee-generated content in a post-pandemic world

COVID has not only put a spotlight on how companies treat employees, but also shifted the employee mindset, with many now realizing the power of their voice. The employee experience will move beyond the four walls of the office, as workers represent and speak to their personal beliefs publicly, too—bringing ever-increasing expectations for company action on societal issues and consistency between a company's words and actions.

We've already seen Adidas employees demand an apology from leadership around toxic behavior, while in this new age of woke-washing, millennial beauty brand Glossier, known for preaching inclusivity and empowerment, was called out for the treatment of Black, Brown and LGBTQIA+ staff in stores. Since such events, corporate leaders at Google, Microsoft, Facebook and Netflix advocated for radical transparency between leaders and employees, to foster a culture where workers were listened to and valued.

Cause-related marketing has been shown to enhance employees' admiration for their company, which in turn promotes engagement, sense of purpose and identification with a company's mission. As a result, companies are now viewing their employees as a powerful source of truth when it comes to advocating company purpose. Since the pandemic hit, many brands have leveraged employee-generated content (EGC), introducing external audiences to a new type of grassroots brand influencer and ambassador: employees.

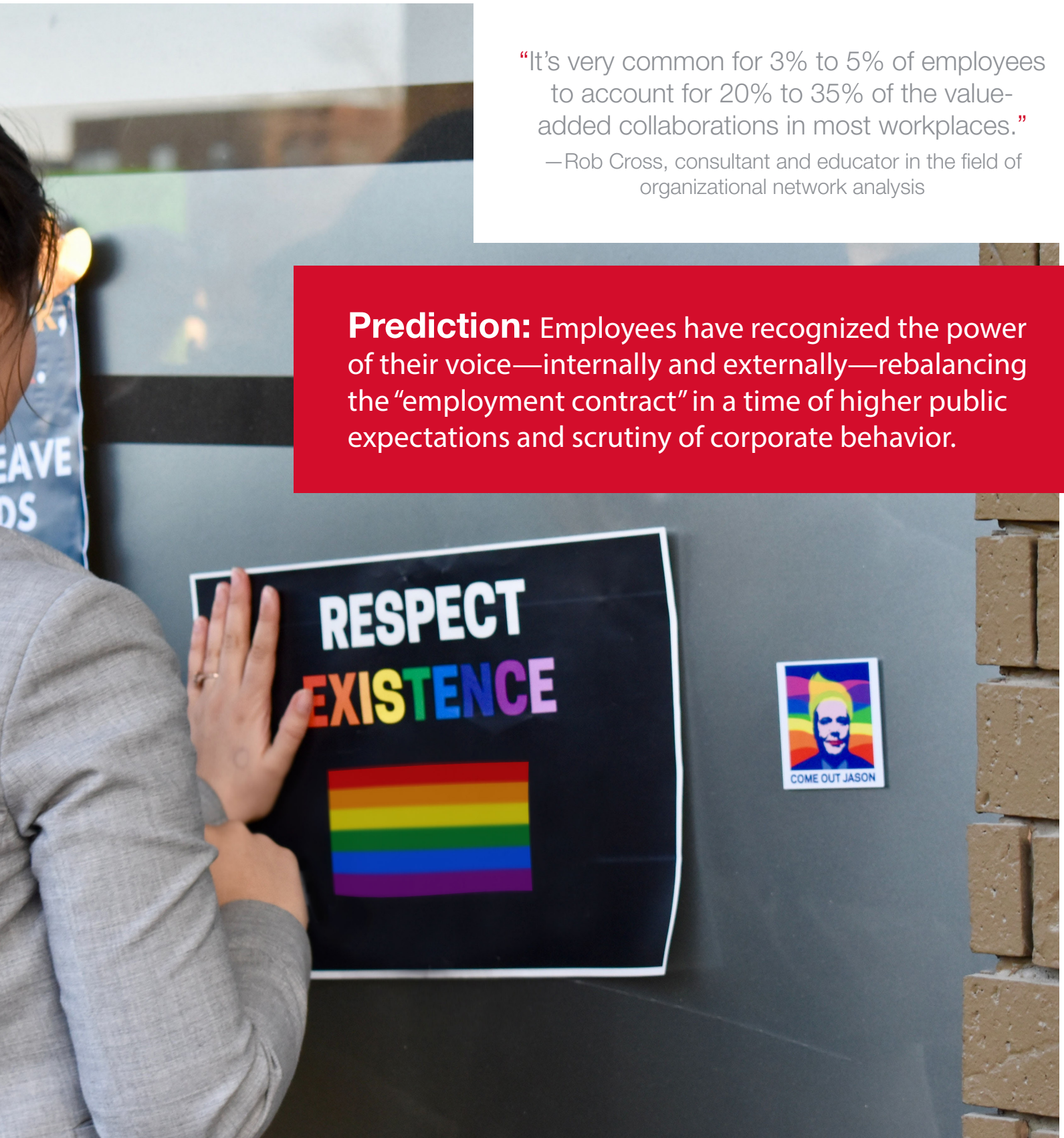
With these lines and channels of communication merging, this calls for a higher degree of transparency and courage from companies—particularly at a time when employees and job-seekers aren't afraid to call them out around a lack of authenticity and follow-through to diversity and inclusion commitments. And if a company doesn't step up, then a competitor will.



“It’s very common for 3% to 5% of employees to account for 20% to 35% of the value-added collaborations in most workplaces.”

—Rob Cross, consultant and educator in the field of organizational network analysis

Prediction: Employees have recognized the power of their voice—internally and externally—rebalancing the “employment contract” in a time of higher public expectations and scrutiny of corporate behavior.



7.

MENTAL MUSCLE MATTERS

Mental health gives physical fitness a run for its money

For decades now, the media has deemed fad diets and fitness trends cover-story material. Meanwhile, the most pivotal aspect of our overall health and well-being—our mental health—has been relegated to sidebars and back pages. While the flexing of minds and hearts is certain to yield fewer compelling before-and-after pictures, the page is at last turning on this matter. From the press to the workplace, mental fitness is finally getting the attention it deserves, and we all stand to benefit.

Startups and entrepreneurs have been busy revolutionizing mental healthcare systems, particularly at the preventive stage, while venture capitalists and celebs rush in to offer a helping hand. Technology services like Calm are growing into billion-dollar businesses, replete with a LeBron James partnership. Hugh Jackman backs the Gotcha4Life charity, which focuses on building mental fitness and friendships where vulnerability and emotional safety are nonnegotiables. And the Lena Dunham-directed BBC/HBO series “Industry” takes on the investment banking industry’s approach to suicide and mental health.

The scale-up in interest and investment in mental health has been largely provoked by the pandemic. Research from Gotcha4Life shows that 7% of Americans contemplated suicide

due to COVID-19’s impact on their mental well-being. However, this figure is slightly less than the 10% of Australians and Brits.

With governments seemingly slow in response to mental health funding and support for citizens worldwide, the private sector is poised to provide solutions through both innovation and employee engagement. Prior to 2020, countries were spending an average of less than 2% of their health budgets on mental health, and it was almost entirely focused at the sharp end, when people need to be treated, rather than at prevention.

This trend stands to substantially change the way mental health support is perceived—for people of all ages. It will become essential that children are taught how to build mental muscle from an early age and that adults put preventive measures into place for them. Companies will also be empowered to tailor support for their workforce’s well-being with programs that support resilience and social connection. Internal comms will play a huge part here, as will achieving a balance between virtual and physical support. Much like sustainability targets, we can expect employee well-being targets to be on the minds of investors and other stakeholders when assessing companies. Because this will require metrics, tech platforms will increasingly help companies track and act on their employees’ well-being, aggregating data around happiness, satisfaction and purpose levels.





Prediction: Now that behavioral health is part of the mainstream conversation and the global marketplace, companies will take more responsibility for helping their employees nurture it—and both the media and shareholders will be watching closely. Look for more preventive mental health initiatives, employee engagement programs and personalized technology solutions.

“As an athlete, there’s a lot of focus on physical fitness. This partnership with Calm is all about mental fitness. It’s something I’ve always prioritized, and it’s just as important to my game, my career and my life than anything I can do physically.”

—LeBron James

8.

TRAVEL LIGHT, TRAVEL RIGHT

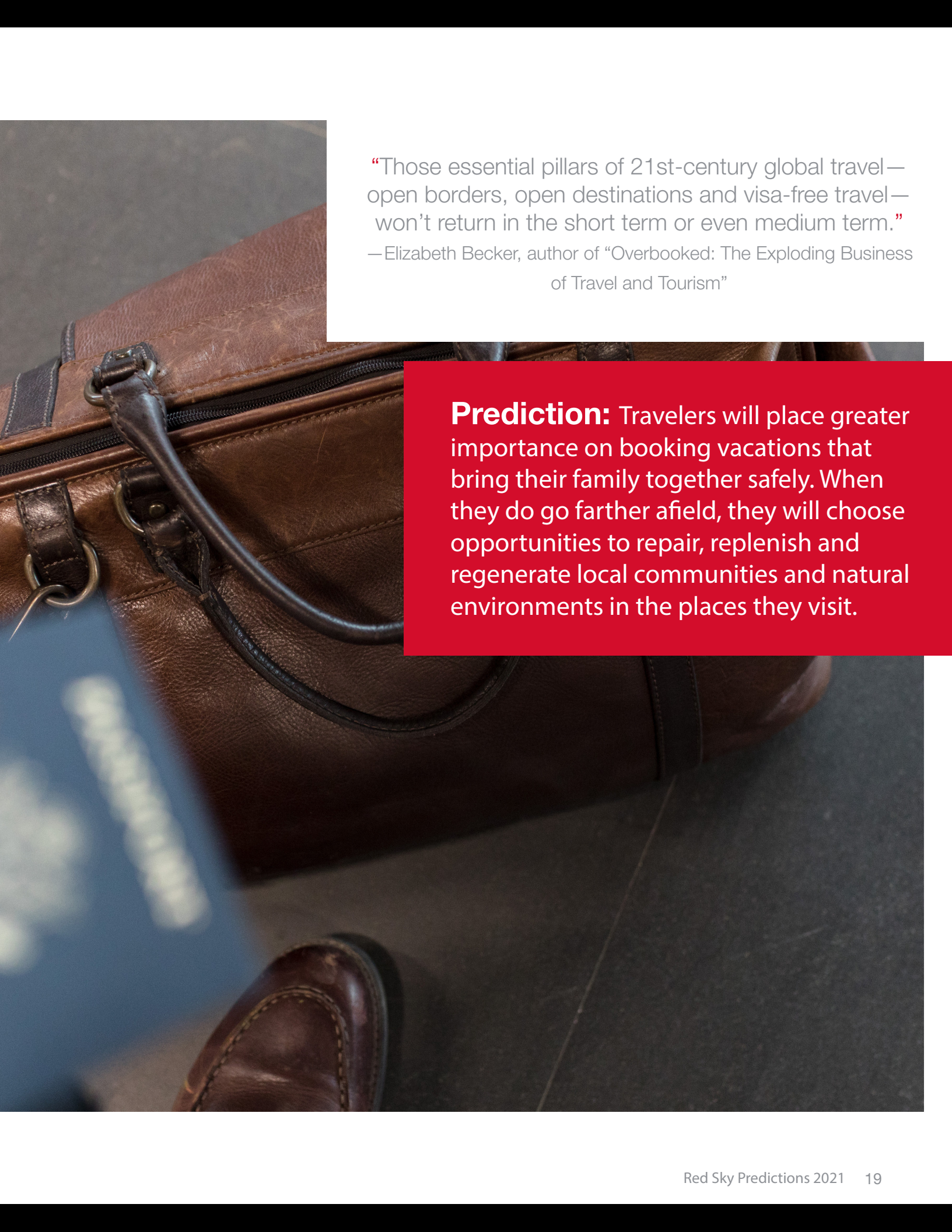
Will you book your next adventure in Concerned-Citizens Class?

The pandemic decimated the multibillion-dollar travel industry overnight as people and passports around the world were grounded. Travelers instead had to get their wanderlust fix closer to home and have adapted their travel priorities.

From wildfires in Australia and California, to floods and volcano eruptions in Asia, to the ongoing pandemic, the world in 2020 was in a constant state of emergency. But from this unpredictability, a new breed of conscious traveler has emerged, ready to roll up their sleeves and help to heal the destination they're visiting. It's an idea that's evolved from sustainable travel, which traditionally works to minimize the negative impacts of tourism. The new era of *regenerative* travel will go even further by aiming to repair the harm that has already been done.

During the pandemic, people have taken a "shop local" approach when it comes to selecting their destinations, using the time under restriction to rediscover their own backyards. Family road trips and nearer-to-home destinations have allowed us safer adventures with our bubbles—and reminded us all of the beauty of the areas where we live. National parks have made a big comeback as families have sought out open spaces rather than big cities and touristy beaches.

Marketers will see an opportunity to create single-minded campaigns that engage travelers beyond an appealing price tag. Furthermore, with greater emphasis put on the car over the plane, car manufacturers should consider how to illuminate the joy of the journey as well as performance.



“Those essential pillars of 21st-century global travel—open borders, open destinations and visa-free travel—won’t return in the short term or even medium term.”

—Elizabeth Becker, author of “Overbooked: The Exploding Business of Travel and Tourism”

Prediction: Travelers will place greater importance on booking vacations that bring their family together safely. When they do go farther afield, they will choose opportunities to repair, replenish and regenerate local communities and natural environments in the places they visit.

9.

BRAND EXPERIENCE BECOMES SENSE-ATIONAL

Leveraging virtual experiences to touch all five senses

The obvious prediction for experiential this year is “more digital.” And, yes, there will be more smart innovations, like how Walmart created this immersive trick-or-treat for one family to have a typical Halloween experience. And it might finally be the year VR goes mainstream (see: Google’s Arts and Culture Tours and the Sundance Film Festival’s many VR offerings for attendees).

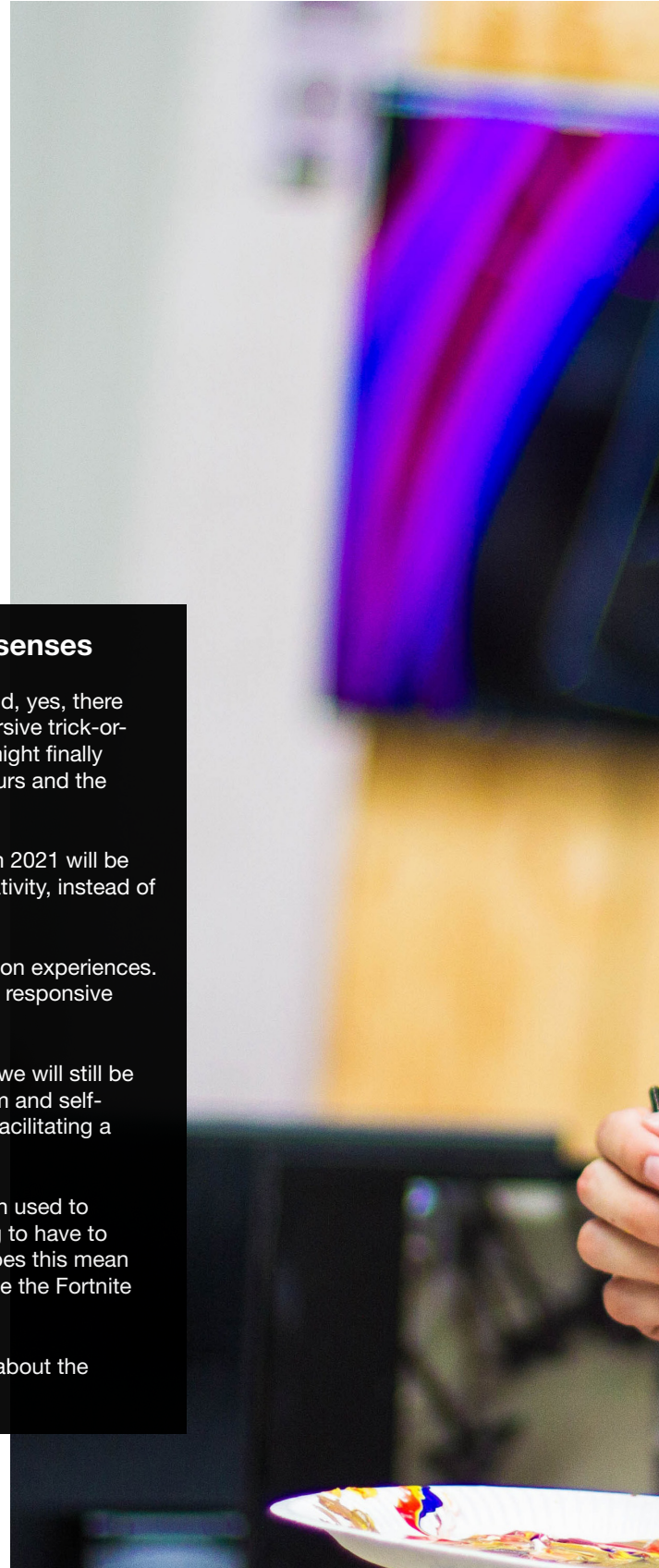
The brands that create the most meaningful experiential moments in 2021 will be the ones that leverage sensory limitations as an opportunity for creativity, instead of being restrained by them.

People are nervous, and there will be lingering doubts about in-person experiences. What does this mean for brands? Contactless journeys and flexible, responsive venues. Like Corona bringing the tailgate to fans’ homes.

We have also flipped Maslow’s hierarchy, and it’s likely that in 2021 we will still be looking for love and belonging instead of worrying about self-esteem and self-actualization. What does this mean for brands? More emphasis on facilitating a sense of connection for people. Like drive-in viewing experiences.

And, after months of lockdowns and restrictions, people have gotten used to staying home—or at least staying local. A brand experience is going to have to be pretty tantalizing to persuade them to make the journey. What does this mean for brands? Be original. Much like Travis Scott’s virtual concert inside the Fortnite game.

In-person brand experiences are here to stay, but we need to think about the psychology behind them more than we ever have before.





Prediction: 2021 will be the year when experiential comes to its senses—delivering on the promise of activations that embrace the best of the physical and digital worlds to touch more of the senses at once.

Consider this: Three of the five senses are available only in real life. We have seen an incredible acceleration of technology this year, but when was the last time you smelled, tasted or touched a virtual experience?

10.

THE GENOMICS GENERATION

The pandemic gives rise to a generation that has never been more interested in our health

More than 20 years have passed since scholars and healthcare experts welcomed a new era in genomics, initiated by the work the Human Genome Project did through the 1990s. It took 2020 and COVID-19 for the study of genes and their functions to make a big impression on the public consciousness, plunging us into Generation Genome.

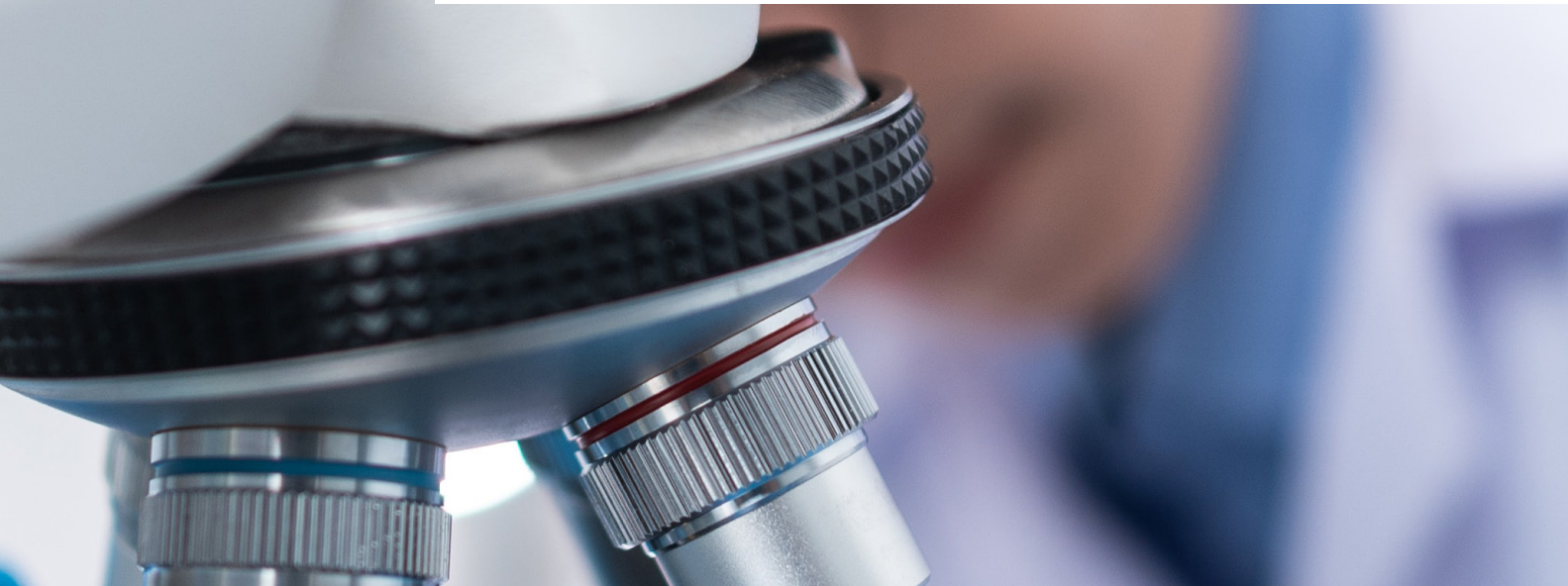
While the very first genome sequencing cost some \$3 billion to deliver, it has tumbled dramatically to just a few thousand dollars today. In May 2020, Forbes wrote that “genomic stocks are in the first inning of a multi-year megatrend.” This was even before we fully understood the likely extended impact of COVID-19. The year-over year growth rate for the genomics market from today to the end of 2024 is estimated to be 10.8%. Globally, it's poised to grow by \$17.23 billion during 2020–2024—powering advancements being used to personalize, predict and prevent disease.

The intense studying of genomic sequencing during COVID-19 has jump-started the technology for sequencing, tracking and mapping genes. This will strengthen the growing field of precision medicine—a study that considers individual variability in genes, environment and lifestyle for each person. Doctors will be able to predict more accurately which treatment and prevention strategies for a particular disease will work in which groups of people.

While promoting our understanding of disease risk based on genetics is not new, the unprecedented investment in it, coupled with revolutionary advancements in AI and machine learning, are taking it new places faster and deeper than ever before. It will become an even bigger factor in how we track disease and healthcare trends. The potential for this to further transform care in the development of new treatments and better tailor approaches to diseases such as cancer, cardiovascular disease, and metabolic and neurodegenerative disorders is massive.



Facilitating our understanding of COVID-19 and its spread, the terms “genomics” and “genomic sequencing” are now part of the 24/7 news media vernacular. This, in turn, is feeding a collective curiosity to learn about our genetics for the purpose of better understanding our health.



Prediction: Breakthroughs in genomics will allow billions of people to live longer and healthier lives. Beyond pure pharma and healthcare companies, genomics will move into sports and nutrition, food and drink, skincare, activewear and beyond. Investors who understand its power on both personalized medicine and consumer health could well make a fortune in the coming years, as marketers become savvy about how to elevate the conversation to media and brands.



UNBLINKERED THINKING UNEXPECTED IDEAS

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