

Digital & Social Media Trends for 2020

Senior Fellows' Predictions & Prognostications

Jen McClure, Distinguished Principal Fellow, Marketing & Communications Center



M&C Senior Fellows' 2020 Predictions & Prognostications

Prompt:

- ✓ What are the biggest and most important trends to watch in digital and social media?
- ✓ What are their implications for communications, marketing and business more generally?
- ✓ What are some of the biggest challenges we are facing / will face with regard to the evolution of digital and social technologies?



Jen McClure, Distinguished Principal Fellow

- Social media is not always that social:
 - ✓ Bots
 - ✓ Organic > Paid
 - ✓ One-way communication
 - ✓ Lack of trust
 - ✓ Weaponization for political purposes
- Private, niche and custom social networks emerge
- Social technologies evolve into enterprise tools embedded into every function
- Boards finally paying attention to governing digital as they realize is data is the new currency and new privacy regulations abound
- Digital governance and digital ethics become important considerations



Distinguished Principal Fellow
Program Director, Social Media Council
Board Member, KQED
CEO, JEM
Publisher, Biznology.com



Shel Holtz, TCB Senior Fellow

- Voice / AI / IoT
- AR
- Deep Fakes
- TikTok



Director of Internal Communications, Webcor
IABC Fellow & 5x Gold Quill Award Winner
Host, FIR podcast



Shel Holtz

- **AI-powered voice assistants** will become the user interface, especially as IoT devices continue to find their way into our lives:
 - ✓ Opportunities / Challenges:
 - Communicators will need to rethink search optimization of their content in order to accommodate voice and consider alternatives to search as voice produces "one true answer" instead of a scrolling list of options.
- **AR** – People are much more accepting of AR (vs VR) because there's no special equipment required; just the smartphone you already have; tools for creating AR are becoming more plentiful and easier to use, too.
 - ✓ Enhancing online ads: e.g., letting you try on everything from glasses to makeup using platforms as common as Instagram.
- **Deep Fakes** – Manipulated voices have been used to trick employees into transferring company money to thieves, thinking they were responding to their CEO's requests. Now that video startlingly good Deep Fakes can be produced from a single image and full-body deep fakes are also possible, Potentially playing big role in upcoming elections. It won't stop there, though. Corporate tricksters are bound to find ways to use Deep Fakes to move markets or damage executive reputations. Be on guard.
- **TikTok** – The social media video app is on fire, with half a billion users and a rapidly growing number of advertisers and companies using it to reach the very young audience of users. The consensus among ad agency executives is that it's here to stay. A whole new set of influencers is emerging on TikTok.



Paul Gillin, TCB Senior Fellow

- Voice – Privacy concerns
- Deep Fakes
- Streaming services shakeout
- Online Influencers



Speaker, author & social media strategist
Technology journalist
Author of 5 books & 300+ articles on
social media & digital marketing
Co-host, FIR B2B Podcast



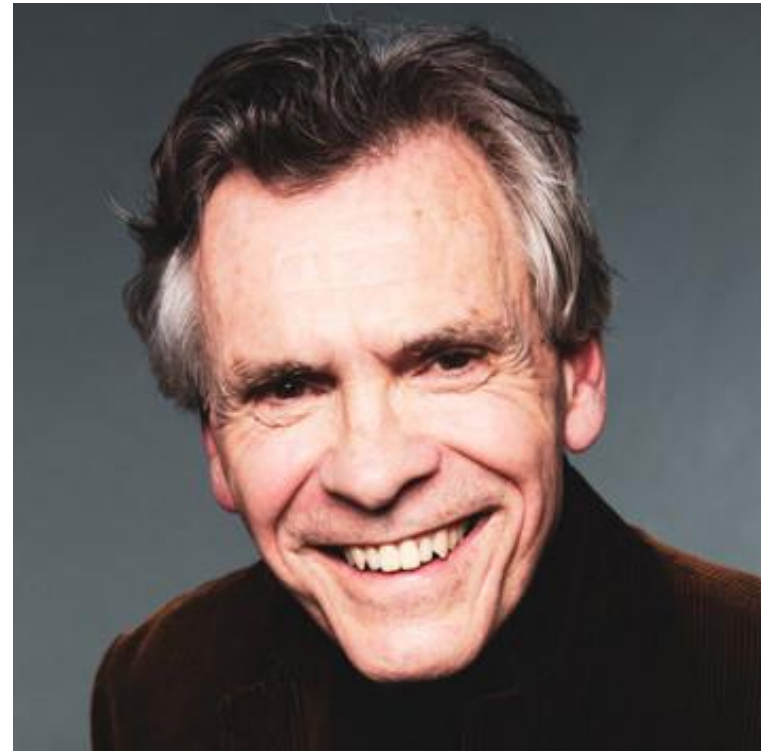
Paul Gillin

- **Voice assistants** will take a hit when it's learned that one of the providers is collecting a lot more data about what people say in their homes than it had previously let on
- **Deep Fakes** will become a factor – and potentially a problem – in social media advertising
- **Streaming services shakeout** will take place as it becomes evident the audience isn't large enough to support all of them.
- **Influencers organize.** Influencer marketing was all the rage in 2019, and influencers want a bigger share of the dollars being invested. In 2020 they begin to band together into a formal organization that lobbies on their behalf for standardized contract terms and minimum payments.



Tim Powell, TCB Senior Fellow

- AI
- Deep Fakes
- Accountability and calls for regulation of social media
- Increasing attention paid to privacy in digital and social media
- Re-examination of “Likes” culture



Founder, The Knowledge Agency
Adjunct faculty member, Columbia University
Author, *Managing Knowledge for Value* (to be published in 2020)



Tim Powell, TCB Senior Fellow

GOVERNANCE TRENDS

- Calls for **greater accountability** for the social media industry
 - ✓ Possible regulation in US and greater regulation in EU
- Continuing **escalation** of digital/social media issues from operational to company policy (C-suite and board) to public policy
 - ✓ Possible next step: international treaties and agreements
- Possible US **anti-trust** actions against largest players – re multi-platform ownership
- Possible **revisiting** of the Telecommunications Act of 1996
 - ✓ Specifically, the “we’re a platform, not a publisher” stance - First Amendment issues
- “**Fake news**” laws – Singapore and China

PRIVACY AND DATA OWNERSHIP TRENDS

- User pressures for **greater transparency** and user control over data
 - ✓ Example: the right to be forgotten
- Ongoing tension: need for user privacy vs. need for law enforcement **emergency access** to user accounts — e.g., end-to-end encryption issue with Facebook

TECHNOLOGY TRENDS

- **Disinformation** becomes rampant in the public sphere (2020 elections), and enters the private sphere — deep fakes and other technologies
- Greater deployment of **AI** to stop things like live-streaming of New Zealand massacre
 - ✓ The industry continues in catch-up mode as AI has (once again) proven to be over-hyped
- Re-examination of “**likes-driven**” culture



Mike Moran, TCB Senior Fellow

- Organic traffic is dropping
- Facebook & Google have killed organic search and social
- Delivering a stellar digital customer experience is crucial for success



Program Director, Digital Strategy & Digital Transformation Councils
Author & expert in Internet marketing, search technology, social media, text analytics & web metrics
SEMPO Board of Directors



Mike Moran

- What we are seeing is that there is one big trend that has big implications: Organic traffic to your website is dropping.
 - ✓ Facebook has killed organic social. Google is moving organic results down the screen in favor of more and more paid results. Why? They are public companies with just one product--advertising--and they need to make their revenues go up. (And if you decide you'll buy display or video ads, then you can cope with 50% ad fraud, so have fun with that.)
 - ✓ Implications? You can't depend on the gatekeepers like Google and Facebook to send you free traffic, so you must create a customer experience so compelling that your site becomes a destination. Look at which websites aren't worried about what Google and Facebook are doing? Amazon. Expedia. You get the idea.
 - ✓ When you want to buy something, you are more likely to go to Amazon directly than to search. Same with travel reservations. Why? It's such a great experience that starting with Google just slows you down. If you can become that go-to site for your industry, you will attract direct traffic while your competitors are paying more and more to Google Facebook, and ad fraudsters to drive their traffic. And you'll convert more of your traffic than they do, also.
- My predictions mirror the above reality.
 - ✓ Marketers will realize that marketing automation has given them efficiency of executing marketing actions, but hasn't given them the effectiveness of a truly compelling customer experience.
 - ✓ In three years, marketers will have made the transition to AI-assisted customer experience. Large companies will realize that the threat from small upstart companies that digital transformation has posed yields a silver lining: the big companies have the most data to use to drive improved experience. The more customers use an AI-driven site, the better it gets. AI makes web sites autonomous by constantly improving.



Dr. Nora Barnes, TCB Senior Fellow

- Chat Bots
- Social media becoming one-way communication



Chancellor Professor of Marketing,
Director of the Center for Marketing
Research,
University of Massachusetts Dartmouth



Nora Barnes

- **Chat bots** will continue to proliferate. Lots of implications for everything from customer service quality to jobs and ultimately engagement. Bots are becoming far more sophisticated and consumers are often unaware.
- **Corporate blogs are becoming a one-way communications channel.** Big businesses (Fortune 500) are increasingly closing down comments on their blogs.



Katie Paine, TCB Senior Fellow

- Future of measurement
 - ✓ AI and data analysis increasingly important tools
 - ✓ Data privacy presents a great challenge to measurement
 - ✓ More holistic view on the value of communications – reporting on ESG issues, e.g., D&I, impact on climate, communities, etc.



CEO & Publisher, Paine Publishing
PR News Measurement Hall of Fame
Medal of Lifetime Achievement, The
Institute for Public Relations



Katie Paine

- ✓ **AI and data analysis will be an ever-larger part of the communications toolkit,** not just for measurement but also for responding to crises, managing risk and even writing press releases. Given the data that many companies already have, available technology could, if we used it right, tell us what the most effective response to a crisis is and how to best de-escalate a situation before it turns into a crisis.
- ✓ **Increasing reliance on data** will bring more analysts and technology types into the communications sphere. Everyone agreed that the ideal candidate is someone who loves math and data more than words. It's just easier to teach someone about communications than it is to teach them about analytics.
- ✓ **A more holistic view on the value of communications.** It's not just somehow "helping the bottom line" or "bringing in more leads" or even "getting impressions."
- ✓ **Data privacy presents a great challenge to measurement.** There's a possibility that a lot of the data that we rely on to "measure" our results is the result of social platforms intrusive tracking techniques. If government decides that it no longer acceptable practice, how will we measure our results?



Katie Paine, TCB Senior Fellow

“Increasingly, CCOs and CEOs are emphasizing measuring how their organization impacts the planet, society, and the communities in which it lives. Communications will be at the center of that discussion. Building (or in many cases, rebuilding) trust is going to be a skill in much demand, and few traditional CEOs or COOs know how to do that.”



CEO & Publisher, Paine Publishing
PR News Measurement Hall of Fame
Medal of Lifetime Achievement, The
Institute for Public Relations



Katie Paine

- Three years from now:
 - ✓ Reporting to prove that you are actually doing something about diversity and inclusion, the health of you communities and climate change will eclipse the need to prove ROI or any other currently accepted metric.
- Five years from now:
 - ✓ All we'll be measuring is how businesses are impacting climate change and the lives of the communities on which their business depends. Chasing the almighty dollar will lose its appeal when so many of your employees and customers will be wondering how, or if they'll survive the next flood or fire.
- 10 years from now:
 - ✓ Advertising Value Equivalency (AVE), HITS and impressions will finally be a thing of the past



Jeff Pundyk, TCB Senior Fellow

- Communications to play a deeper role in the strategy development process



Former Chief Strategy Officer & Editorial Director, Techonomy
Former Global VP, Content Solutions, The Economist
Former Publisher of The McKinsey Quarterly



The screenshot shows the top navigation bar of the Wharton Knowledge@Wharton website. It includes the Wharton University of Pennsylvania logo, language options (English, 简体中文, 繁體中文, Español, Português, KWH5), and social media links. Below the navigation is a search bar and a menu with categories: TOPICS, REGIONS, RESEARCH, K@WRADIO, MORE, and ABOUT. The main content area features a thumbnail for an article titled "Overlooking Communication: Why Strategists Are Missing a Trick" under the "MANAGEMENT" category. The thumbnail image shows several hands interacting with colorful gears on a wooden surface.



Top 10 Imperatives for Success in 2020 & Beyond

1. **Digital literacy:** people, process, technology, opportunities, challenges, risks and regulations
2. **Innovation** in digital experience: AI, AR, voice, online communities, mobile
3. Rethink **search**
4. Rethink **influence**
5. **Investment in social media** – people and budget
6. **Rethink org structures** – cross functional collaboration
7. **Scenario planning** and development of **playbooks** to address **deep fakes** and other fast-moving communications challenges
8. Build or rebuild **trust** with stakeholders and all audiences
9. Deliver, **measure** and communicate a holistic view of **the value of communications**
10. **Earn a seat at the table**



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