

2021 Data-Driven Trend Report

Ketchum shifts in culture



Introduction

At Ketchum, we believe in doing work that matters. We do this by identifying the tipping points, the paradigm shifts, the cultural happenings and behaviour changes taking shape.

The next normal is going to be different. It will not mean going back to the conditions that prevailed in 2019. Just as the terms “pre-war” and “post-war” are commonly used to describe the 20th century, generations to come will likely discuss the pre-COVID-19 and post-COVID-19 eras.

We call this report ‘Shifts in Culture’ to reflect our cultural insight philosophy. Our foresight approach is empirical: we drew insight from millions of data sources, scanning daily for indicators of cultural shifts and linking them to 129 macro and micro trends shaping emergent consumer needs, values and behaviours globally. We looked for shifts in culture that are already underway, and predictions for 2021, using the public’s own

stated desires (as revealed in social media discussions) and upcoming events (outlined in our events calendar) to triangulate likely reactions.

Shifts in Culture is not just a report: it provides critical insights into the forces put in motion by the COVID-19 pandemic and where the forces are heading, so that you can best prepare for the future.

Shifts in Culture showcases our approach to insights, demonstrating our ability to understand culture, people and change, and our capacity to translate data into practical recommendations for content, creative and messaging.





About this report

In this report we introduce the five 'shifts in culture' that started to occur in 2020 - and, we believe, will continue shaping culture throughout 2021. These shifts are profiled in the following report, each mapping what happened in 2020; quantifying the trend in social data and search; exploring what next in 2021; and discussing the implications for brands and businesses.

We also deep-dive into two sectors, Gaming and Retail, which are seeing some of the most transformative changes for forward-thinking brands across all sectors.

Finally, we provide opportunities to connect with your audience in meaningful ways in 2021 through our cultural moments calendar. This provides a list of pop culture events, historical landmarks and, after anniversaries as well as business events to inspire creativity and provide you with practical opportunities to plug into culture.

→ Serious play

Play is not just light-hearted fun but a source of tremendously valuable control, catharsis and connection

→ Retro nostalgia

Looking back to simpler times for a comforting hit of vintage fashion and style

→ Immersive experience

Reconnecting with our senses (and ourselves) through emotive, all-encompassing immersive games, exhibitions and VR technologies

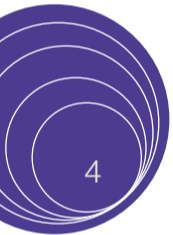
→ Closer communities

Disconnected from our face-to-face communities, we have retreated into niche internet cultures and tight social bubbles - a shift we must reverse

→ Local lives

Busy commuters have rediscovered their local high streets and parks, sparking a renaissance of local community retail and volunteering





About Ketchum Research & Analytics

This study is powered by Ketchum Research & Analytics (R&A) – one of the largest research groups embedded within a leading communications agency, and recently honoured with the AMEC Platinum Award for Most Effective Media Intelligence, Research and Insights Company.

Our global team of 100+ research specialists include PhDs, trends analysts, behavioural and machine-learning experts, and data strategy consultants across 12 cities worldwide. We provide integrated research, strategic planning, and digital and predictive analytics to help our clients build more effective communication programmes.

We're particularly known for our work in:

- **Behavioural & Cultural Trends**
- **Thought Leadership Strategies**
- **Audience Segmentation & Messaging Strategies**
- **Earned Media Attribution**
- **Predictive Analytics**

At the centre of these efforts are our proprietary technology platforms – PRQ and OMNI - that combine Artificial Intelligence and Big Data to quantify and predict cultural changes and understand what truly matters to our audiences.



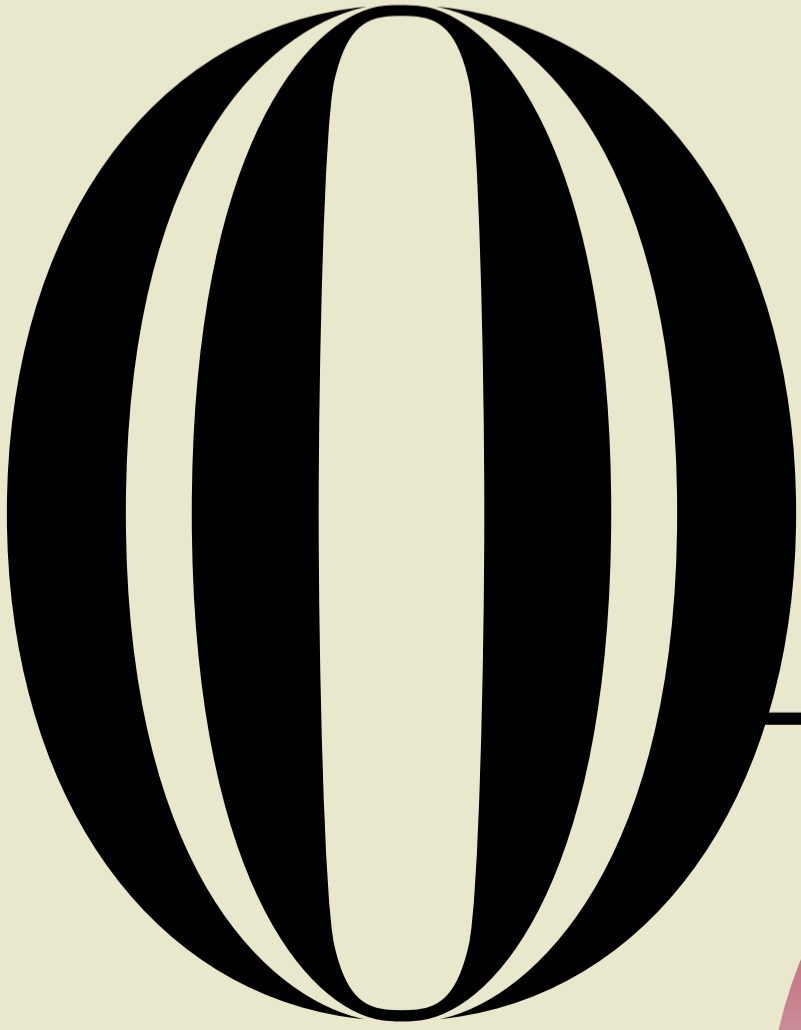
In this report we used

+ **PRQ:** our proprietary technology to quantify and predict cultural changes. It allows us to make sense of the chaos of culture and help our clients place smarter bets on the future.

+ **Pi Datametrics:** an award-winning global search solution. It allows us to quantify changes in search behaviours and map keywords and key phrases to maximise content visibility.

+ **GWI:** a global consumer insights platform. It provides us with data on the habits, lifestyles and behaviours of bespoke target audiences to shape and quantify our demographic insights.

+ **TalkWalker:** a world-leading social media listening software. It provides us with real-time insights into consumer needs and pain points to inspire creative platforms and inform messaging.



serious play





“ It’s hard to
quantify just
how important
festivals are
to our
collective
wellbeing... ”

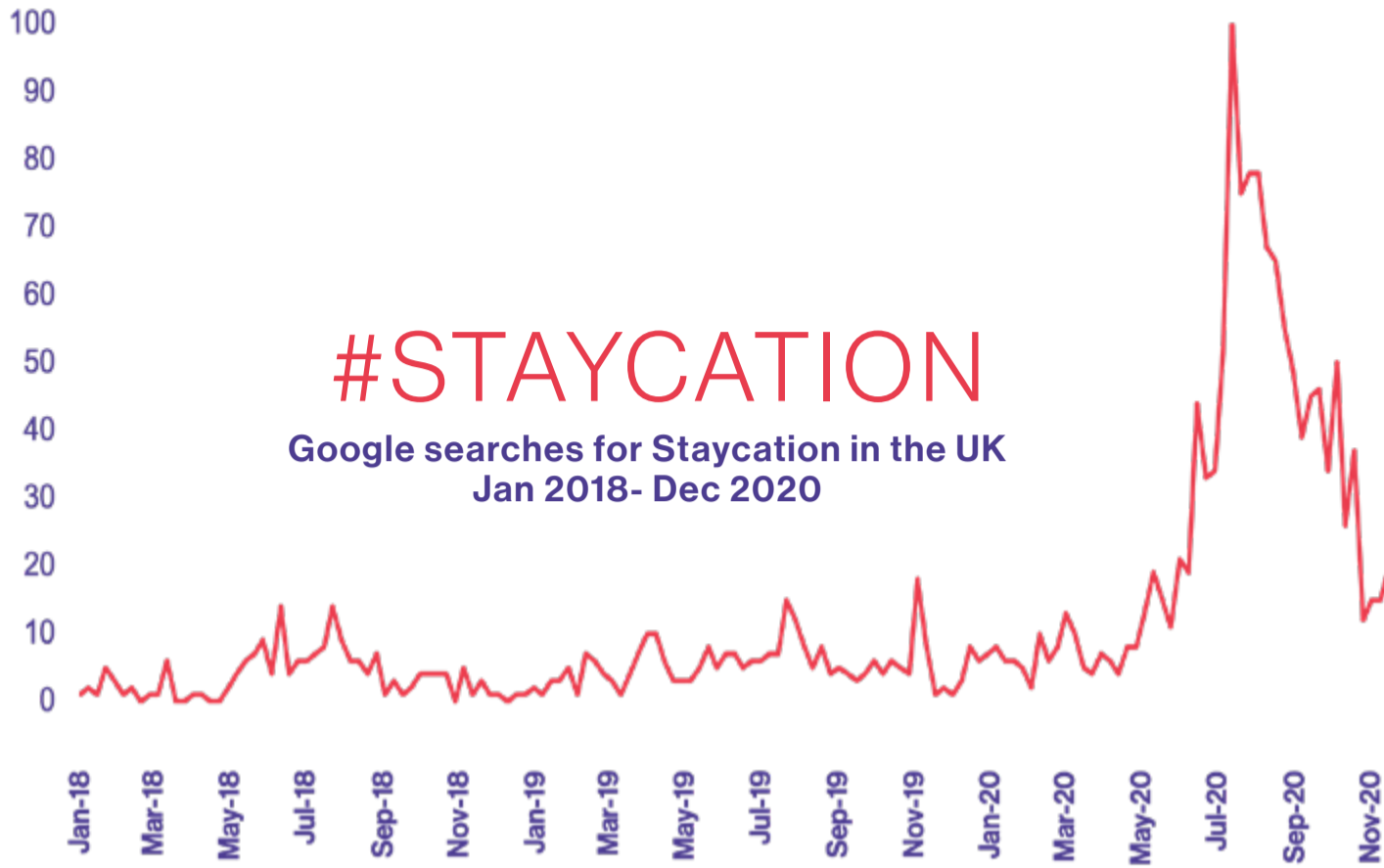
... “the physical components are pretty simple — a field, a few stages, some tents, food, drink and lots of people — but taken together, they provide something far greater. It’s a sense of camaraderie, escapism and life-affirming joy that few other things can conjure”

” -- Jochan Embley,
Evening Standard

After a year+ of lockdowns, cancelled plans and postponed events, the second half of 2021 offers the exciting prospect of fun finally resuming. This year we believe play will mean more to us than ever, as absence has made us realise what we love about coming together, losing ourselves in the music, challenging ourselves athletically, and soaking up new places, cultures and experiences. No longer will we take these moments of entertainment and exploration for granted: in 2021 play will feel precious, much-hoped-for and hard-won.

As the world opens up, brands and cultural institutions have the opportunity to craft extraordinary cultural ‘re-entry’ experiences - and create once-in-a-lifetime memories of delight, joy and wonder.





What we saw in 2020: Playful Travel

2020 was for many, the year without taking a holiday, even time off, for that matter. Yet as the first lockdown eased, people started to explore what limited fun might be possible - and the “staycation” entered UK conversation.

Searches for “staycation” started shooting up w/c 14 June 2020, the week non-essential retail reopened

after lockdown and it started to feel as though a more normal life was resuming. Searches peaked w/c 26 July 2020, the week some of the last restrictions on gyms, sports facilities and public transport were removed. What stands out is not just the desire people had to make the most of their renewed freedom, but also the playfulness of the experiences people were seeking. Disneyland might be off the menu, but teepees and treehouses were back on, as people searched for “glamping”, “log cabin”, “spa”, “hot tub”, “treehouse” and “island”.

People may not have been able to escape abroad, but instead were escaping into their imagination and the kind of fanciful, fairytale experiences that harked back to childhood holidays and simpler times.

With travel likely further limited well into summer 2021, it’s likely to be another bumper year for staycations - with knock-on consequences for everything from fashion (yet another year of wholesome prairie dresses) to sales of garden decor and children’s play equipment (bigger than ever).



**There’s a reason
that the Roaring
Twenties followed
the 1918 pandemic...**



**-- J.J. Abrams,
New York Times**

... “we have a pent-up, desperate need to see each other — to socialize and have communal experiences. And there is nothing that I can think of that is more exciting than being in a theater with people you don’t know, who don’t necessarily like the same sports teams or pray to the same god or eat the same food. But you’re screaming together, laughing together, crying together. It’s a social necessity”





What's coming: The Roaring 2020s

We enter 2021 on the back of an enormous stock market rally and with the feeling of making up for lost time following a pandemic. As such, it's little surprise that the 1920s feel highly relevant now, a hundred years on.

In his book 'Apollo's Arrow: The Profound and Enduring Impact of Coronavirus on the Way We Live' (2020), Yale professor and social epidemiologist Dr Nicholas Christakis, looks back on how societies have recovered from pandemics of the past to predict the return of the 'Roaring Twenties'. The caution, abstemiousness and reduced spending of 2020 will take an about-turn, he forecasts, into a boom period where "people will relentlessly seek out social interactions" with behaviour including "sexual licentiousness," liberal spending, and a flourishing of the arts.

Christakis does not anticipate this to get fully underway until 2024 - but we believe the first signs may be visible in 2021, as F. Scott Fitzgerald's epoch-defining novel 'The Great Gatsby' enters public domain and is likely to inspire a wave of adaptations, commentary and themed events. Taylor Swift has already taken inspiration from the novel for her latest album 'evermore' - in particular the song Happiness - and a novelistic prequel is arriving in February from US writer Michael Farris Smith, exploring the enigmatic narrator Nick Carraway's life prior to meeting millionaire Jay Gatsby.

This evolution of the 'Serious Play' trend is party-as-catharsis, a moment of release and escapism from a very pressured and stressful time. Some of the narrative ambivalence of Gatsby-the-novel may get lost in the images of glittering mansions and Jazz Age decadence that will dazzle our eyes and screens. After a year spent by many in loungewear and tracksuits, there will be appetite for a return to dressing up (although also expect, er, sequined loungewear). 1920s costume parties may make a return for Christmas 2021 - masks usefully being an integral part of this look.

Earlier in the autumn, as coronavirus restrictions only partially loosen, it's a theme we expect to see explored in static; socially distanced events such as Secret Cinema, sit-down jazz clubs, and retail set dressing.



2021

Jan

IPO of games platform Roblox, January

Used by 1.5 million children in the UK, Roblox's IPO will determine exactly how financially lucrative the business of digital play is

Feb

Mar

New James Bond movie released, 2 April

British actor Lashana Lynch to play the first black and first female 007, in a move likely to generate discussion around representation

Apr

Rescheduled Academy Awards (Oscars), 25 April

Director of 2011 pandemic thriller 'Contagion' Steven Soderbergh is co-producing, and says he wants it to "FEEL like the movies we all love"

May

Jun

Rescheduled UEFA Euro Championship, 11 June

The European Championship will enter new territory in 2021 with the tournament set to take place in 12 host countries around the continent

Jul

Rescheduled 2020 Tokyo Olympics, 23 July

Japan's PM sees summer Olympics as a "symbol of global solidarity", celebrating athleticism and inspiring activity among locked-down populations

Aug

Sept

Oct

Nov

Dec

Implications for brands

→ Focus on

Instagram Stories:

Instagram has been quiet during lockdown periods as people have less to share, but will return. During the interim period where some people will be relaxing on distancing restrictions faster than others, design participatory interactions are to focus on stories, not main feed posts, so that your audience can engage in selective sharing if desired.

→ Give people opportunities to capture the moment:

photo backdrops and "selfie concierges" to help you get the perfect shot, or even pro videographers to capture family reunions and baby's first vacation.

→ Outside-the-box

keepsakes: people will desire souvenirs and lasting memories of these moments, such as festival and musical 'merch'. There may be an opportunity to offer more imaginative and upscale options other than just a £20 t-shirt.

→ Find opportunities to reassure on safety:

cancellation policies, distancing and mask-wearing rules all need to be communicated more prominently than usual.

→ Recognise the depth of emotion (but also anxiety) around resuming play:

this is incredibly powerful and has the potential to create transformative customer relationships for brands who get it right.

→ Recognise that collective cultural events will be functioning as rituals:

from festivals to football games, close attention to the structure of ritual form (thresholds, liminality, reintegration) will enable organisations to create events that are moving, satisfying experiences. Consider working with experienced designers who are expert in structuring these moments.





retro nostalgia





“ Nostalgia
is an extremely
powerful
force linked
to memory... ”

“ -- David DiSalvo,
via Spotify ”

... “but it has a way of putting a rosier view on our memory. When we smell chocolate chip cookies, it’s linked to memories that bring us back to a more stable, comfortable place in our lives. We can inhabit it in our minds and feel a level of support that most of us aren’t feeling right now because there is so much instability”

After a testing year, people are looking back to what seemed like easier times. Retro styles, hobbies and activities offer a kind of aesthetic comfort blanket, offering a reassuring sense of nostalgia for ‘simpler times’: be that the 1960s fashion of ‘The Queen’s Gambit’, 2020’s breakout TV show - or the silvery, optimistic futurism of “Y2K” which Gen Z continue to seek out.

From high fashion to vintage Nikes, the new status symbols are old things. Getting something vintage can be much more exciting, credible, and ethical than just going out and buying a brand-new item. Vintage is also kinder to the environment, playing into an era of heightened sustainability-consciousness and the desire for quality that stands the test of time.



We enter 2021 in a more hopeful mood with the vaccine rollout underway, yet also aware that the immediate future will remain challenging for months to come.

In this ongoing uncertainty about the future, looking back on a rose-tinted past will remain comforting.



Emily in Paris
21,813
Total mentions



Normal People
31,467
Total mentions



I May Destroy You
35,335
Total mentions



The Queen's Gambit
88,324
Total mentions

The "strong female leads" of 2020
23rd Mar 2020 – 31st Dec 2020



What we saw in 2020: Vintage Media

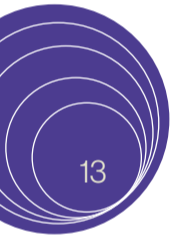
Across media, from music to film and TV, audiences looked back in 2020 to simpler times and much-loved formats of the past.

Early on in the pandemic, Spotify saw a 54% increase in listeners making nostalgic-themed playlists, as well as an uptick in the share of listening to music from the '50s, '60s, '70s, and '80s - with 1950s increasing the most. The company speculated that listeners "were trying to recreate moments from their past to find comfort, calm, and a break from the day-to-day." Meanwhile, sales of vinyl records surpassed CDs for the first time since the 1980s, with US consumers spending a massive \$232 million on vinyl in the first half of 2020, nearly two thirds of total physical music revenue. In the UK, we returned to that most classic of media: radio. Global Radio, the home of stations such as Heart, Capital, LBC, and Classic FM, saw a 25% increase in daily reach and Nation Radio, reported a 40% boost.

TV viewing also changed: in the first six weeks of lockdown, Britons returned to TV classics with viewings of *Only Fools and Horses* up 20% year on year, and *Last of the Summer Wine* up 30%.

The breakout TV show of the year was also a nostalgic one, namely *The Queen's Gambit*, set in the 1960s. 2020 was a rich year for young, female-led dramas, with *Normal People* generating buzz during the first lockdown, followed by *I May Destroy You* (Network) and *Emily In Paris* (Network). But it was *The Queen's Gambit* that captured the world's imagination – inspiring social media posts and digital media content about chess, fashion, beauty, interiors and addiction, among other topics. Both *The Queen's Gambit* and *Normal People* may have achieved 62 million streams globally, but it was *The Queen's Gambit* that was by far the most discussed show in UK social media, with 43,105 mentions vs. *Normal People* at 30,720.

People particularly praised the costumes, the set design and colour palettes - inspiring younger viewers to say that they wished people were still dressing in these 1960s retro styles, or inspiring some vintage dress shopping and cosplay of their own.



What we saw in 2020: Vintage Fashion

Vintage fashion is not a brand new trend, but went from strength to strength in 2020. Celebrities and fashion fans continued to seek out 'archive' garments as a means of demonstrating their fashion knowledge and ability to access ultra-rare items. Nineties brands were particularly sought out: Kendall Jenner wore a mesh set from Jean Paul Gaultier's Spring 1994 collection during London Fashion Week in February 2020, and designer resale site Vestiare Collective reported booming sales in vintage Versace and Tom Ford-era Gucci clothing, plus Christian Dior Saddles, Fendi Baguettes and Prada nylon styles for bags.

As such, second-hand clothing marketplaces have seen substantial investment, with Vestiare raising \$63 million in April 2020. Previous 2019 funding rounds saw both Lithuanian resale site Vinted and American sneaker resale site StockX achieve \$1+ billion 'unicorn' valuations.

On the more affordable side, second-hand clothing marketplace Depop has gained 25 million users across 147 countries who list 140,000 new items on the platform daily. Depop seller Ellie Garthwaite reports a trend that "fast fashion is slowly taking a step back, while slow fashion and vintage items are becoming increasingly popular". Turn-of-the-millennium brands such as Jane Norman have been revived among a younger generation seeking out the styles their older sisters coveted: VICE described "the Jane Norman aesthetic" as something that "evokes pure nostalgia, whether you shopped there at the time or just looked up to those who did."



**Fast fashion
is slowly
taking a
step back...**

... "while slow fashion and vintage items are becoming increasingly popular"



-- Ellie Garthwaite,
Depop seller

What's coming: 1981 and 2001, again

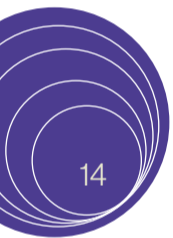
The mainstream fashion cycle was severely disrupted in 2020, and we anticipate that fashion will remain asynchronous and often vintage-led in 2021.

Designer fashion is struggling for relevance. September's SS21 catwalk shows were largely cancelled, and the collections designers produced proved wildly out-of-sync with consumer needs; in a year of working from home, people sought loungewear and comfort above all else. As such, clothing sales fell dramatically (August 2020 saw sales 16% below pre-pandemic levels) and seem unlikely to recover until the world reopens in late 2021.

In this gap, vintage and second-hand clothing will continue to grow as the affordable, sustainable and creative go-to choice. Generation Z and younger celebrities such as Bella Hadid will look to early 00s looks, with TikTok's e-boys and e-girls echoing that era's emo aesthetics, and rumours that Balenciaga's City bag will be next to see a fashion revival.

Spencer, the Princess Diana biopic starring Kristen Stewart, will be filming in 2021 and it will also be forty years since the royal wedding. This suggests a revival of media interest in floppy collars, bouffant 'leg of mutton' sleeves and preppy Sloane styles.

Interiors, as much as fashion will take inspiration from these retro trends and colour palettes, as we discuss further in the next section on 'Immersive Experience'.



Jan

The Great Gatsby enters public domain, 1 January

Following a damp start to the 'Roaring Twenty-Twenties' F. Scott Fitzgerald's glittering tale of artifice and excess is ripe for creative reinterpretation in 2021

Feb

Release of WandaVision on Disney+, 15 January

Picking up where Avengers: Endgame left off, WandaVision is a "love letter to the golden age of television", meshing 1950s sitcom tropes with superhero storytelling

Mar

Drake releases new album Certified Lover Boy, January

Drake premiered a nostalgic trailer for his sixth studio album, featuring visual references to his past albums and suggesting a mid-career retrospective

Apr

May

Jun

Jul

Aug

Goodbye to Internet Explorer, 17 August

Despite long ago switching to Chrome, the death of Internet Explorer is a chance for 90's kids to indulge in nostalgia about the early days of the 'world wide web'

Sept

Oct

Nov

Persuasion arrives in cinemas, late 2021

The adaptation of Jane Austen's final novel will continue the Bridgerton boom in retail searches for empire line dresses, puff sleeves, and corsetry

Dec

Implications for brands

→ Push sustainability factors:

retro classic trend is an opportunity to remind consumers of the benefits of sustainable, breathable natural fabrics such as wool, and potentially encourage them to upgrade their purchases to higher quality options. Natural fabrics feel 'classic', and also offer greater repair and fabric recycling benefits.

→ 'Sell-back schemes' and brand-owned second-hand marketplaces:

offer an opportunity for brands to benefit from the value in vintage clothes, accessories and furniture - which would otherwise be channelled through Depop, Vestiare, Ebay etc. It also has value in offering a lower price point and alternative, sustainable entry point into premium brands for younger customers.

→ What's on the inside matters:

through 2021, this pattern of greater growth in homewares than clothing is likely to continue, with consumers likely seeing more value (and more willing to 'splash out') on interiors than outfits.

→ 'Shop the look' content:

copious opportunities for clothing, beauty, homewares and other retailers to create 'get the look' content and displays tied into retro TV series and movies - check out our 2021 calendar for key releases.

→ Mine the archive:

can your brand or retailer re-issue classic styles? The concept has potential for everyone from designer brands (who now increasingly have a 'core' collection) to home retailers e.g. Habitat, Ikea.





immersive- experience





“ Sitting in
silence isn't a
good thing,
even though at
times we
need a bit of it... ”

” -- Alex Beresford,
via Twitter

... “this may seem obvious if you live alone but have some background noise. The radio, the TV, the window open hearing the kids next door kick the ball - that you used to hate” #britankeeptalking

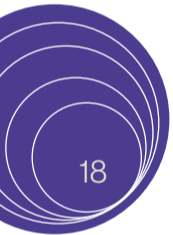
The year of 2020 meant social distancing, quarantining and lockdowns, starving people of their innate need for human interaction.

As people look to inject feeling and warmth back into their lives and move far away from the humdrum of pandemic routines, this year will see an increased demand for experience: from all-encompassing immersive games, exhibitions and VR technologies, to moving and emotive experiences make us feel something new.

As the world reopens up, brands and cultural institutions have the opportunity to fill the void left by absent human contact over the course of the pandemic by offering products and experiences that appeal to our most basic emotional need: to feel part of something bigger than ourselves.



After a year of guidelines, rules and limits on human interactions, we are looking for products and experiences that tap into human emotion more than ever - seeking solace in those that offer a sense of immersion, and that ease the horrible loneliness and separation that have been a hallmark of 2020.



What we saw in 2020: Ambient Media

Without the constant sounds of office chatter, busy fingers clicking away at keyboards and printers jamming and beeping, many remote workers were made acutely aware of their social isolation over the course of the pandemic.

We sought consolation in ambient media to make up for this, from virtual white noise playlists, to audio that re-created the bustling office vibe. Between April and July 2020, more than half a million people listened to [The Sound of Colleagues](#), a webpage and Spotify playlist of workplace sounds. “The sound of someone else punching the keys is an indication that there are people around me,” [said one listener](#), capturing perfectly the essence of this need to simulate human contact during this extended period of social isolation.

In his New York Times article entitled ‘[This Was the Year When Everything Became TV](#)’, James Poniewozik nodded to this void left by a distinct lack of bustle as the global pandemic constrained our boundaries to the four walls of our homes and four corners of our screens. He noted how “in a workplace, other people are there in an ambient way — they drift in, they drift out, there’s an occasional did-you-see-this exchange between tasks.” The new world of video calls replaced

these ambient interactions with an on/off experience of human presence more like TV, where “people become episodic. Someone is present until their little rectangle winks off and they disappear.”

In exchange, cultural critic [Kyle Chayka](#) [observed](#) how TV was increasingly becoming “ambient,” with Netflix pioneering a genre “as ignorable as it is interesting,” from the inanities of *Emily in Paris* to an array of reality shows from home decor to outdoorsmanship. This is TV designed to be played continually in the background, while you work, stare at social media dramas on your phone, or deal with the domestic labours of quarantine. Ambient TV, Chayka argues, “aims to erase thought entirely, smoothing any disruptive texture or dissonance. Its high-resolution shots are chopped and composed into lulling montages—slow motion, fast motion, drone footage—that numb the senses with color and movement. It provides glossy, comforting oblivion.”



**TV is increasingly
becoming ambient,
as ignorable as
it can be**



**-- Kyle Chayka,
Cultural critic**



Farrow & Ball reported
+28% growth
in their deep, rich blues

Irish paint brand Curator reported
90% decrease
in sales of its most popular grey



90% of people
said that their home was important to make their life better



Colour of the year
Pantone Illuminating 13-0647
a bright sunny yellow

What we saw in 2020: Immersive Colour

Confined to our homes during lockdown - and with millions working from home throughout the year - 2020 was a year where we reprioritised our domestic spaces. In an [August 2020 survey](#) for retailer B&Q, nine out of ten people said that their home was important to make their life better, and 57% felt it was even more significant post-lockdown. Home improvement sales were duly a key driver of post-lockdown [consumer spending growth](#), as Britons invested in creating a safe, cosy and reassuring living environment.

Supported by evidence that colour has been shown to affect mood and ease anxiety, many turned to paint to create a warm and comforting ambiance. Britain waved farewell to once popular whites and greys in favour of deeply saturated tones that rejuvenated and inspired us while bunkered down at home. Irish paint brand Curator reported a 90% decrease in sales of its most popular grey - while Farrow & Ball reported a +28% growth in their deep, rich blues.

As [Joa Studholme](#), the colour curator for Farrow & Ball put it: "There is a tendency to crave warm tones in challenging times. It's all about being warm and earthy and choosing deeply saturated color. It's about trying something that gives you a great big hug."

In pre-COVID-19 times, minimalistic, stripped-back home interiors may have offered respite from chaotic schedules and hectic lifestyles. In months ahead, the legacy of coronavirus will see people injecting colour and warmth into their homes to create living spaces that offer a sense of feeling embraced and included. Looking into 2021, [Farrow & Ball](#) forecast the popularity of warm hues such as India Yellow, Tanner's Brown and Dead Salmon, which, despite its disagreeable name, is a beautiful, aged pink. Other colour forecasters agree: Pantone named Illuminating 13-0647, a bright sunny yellow, as one of its colours of the year for 2021, considering it a colour of "strength and positivity".

This desire to enhance our at-home experiences may extend beyond visual colour to the full array of sensory experiences. People may seek out textured materials for tactile stimulation, such as linen bedlinen, velvet sofas, jute and sisal carpets, or rattan furnishings.

Conscious use of incense, scented diffusers and home fragrance can create a sense of daily variation and structure that the stay-at-home life may lack. In the words of writer [Rahel Aima](#), an "olfactory mood playlist to move through my day."



What's coming: Re-Immersion In The World

The pandemic has reminded us of the true value of being around people and being immersed in a lively, interactive world.

With lockdown, social distancing and working from home likely to extend well into 2021, people will continue to look for ways to escape domestic monotony and isolation. Gaming will provide one avenue: as discussed in Trend #1, Serious Play, it has become a substantial social realm. Remote but collective exercises experiences, such as Peloton and Apple Fitness+ exercise classes, and virtual running races from 5Ks to marathons, will continue to provide another venue for us to “be apart together” and gain a sense of collective participation and achievement. Zwift’s virtual courses for running and cycling let athletes feel like they’re working out on the streets of London, New York or its own ‘Watopia’, using visual immersion to offer a sense of variety, escape and motivation.

In 2020, many of us have re-discovered our local parks and countryside, and have shifted our social lives from cafés and bars to outdoor squares, waterfronts and ‘coffee-walks’. As we enter a second pandemic spring with social distancing requirements remaining, these outdoor spaces need to offer people a sustained, connected feeling of being in public. We will desire a sense of ‘bustle’, a pleasant hum of activity and life - which might be provided by extending outdoor seating and pedestrianisation to create an enjoyable sense of ‘café society’ (as occurred in London’s Soho during the summer and autumn). Outdoor markets, food trucks and food halls can provide a safer, well-ventilated retail and entertainment options during this in-between year, with heaters and blankets helping people linger into the evening.

And while indoor performances may remain limited for some time, we should be ambitious with what happens in the outdoor, public realm. Art, music and dance should shift to meet their audiences: what if we might meet our friends not only for a coffee and a walk, but a slice of world-class culture?



2021

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sept

Oct

Nov

Dec

Ryoji Ikeda exhibition at 180 Studios, 2-28 February

The first show by a solo artist to take over all five floors of 180 Studios, Ryoji Ikeda’s colossal audio-visual installations immerse visitors in data-driven light and sound

London Fashion Week, 19-23 February

The first gender-neutral, largely season-less Fashion Week will take place live on the LFW digital platform, doubtless pushing boundaries of what a brand and retail experience can be

Electric Gamebox immersive gaming booths, February

(reopening subject to UK restrictions). Each room at Electric Gamebox in London, Manchester and Essex has 360-degrees of visuals projected onto touch-sensitive walls, for groups of up to six players

Comic Con museum opening, 22-25 July

Celebrating 50 years of San Diego’s Comic Con, the museum will provide fans with in-person experiences and virtual programmes in “an experience unlike any other”

God of War: Ragnarok released, Autumn

The most anticipated game of the year offers an epic mythological battle between Norse gods at the end of the world. Expect excitement about the Playstation 5’s extraordinary graphics and immersive virtual worlds

Launch of James Webb space telescope, 31 October

NASA’s James Webb space telescope will find the first galaxies that formed in the early universe and watch planets being born - immersing us in deep space and cosmic awe

Implications for brands

As the world begins to open up, our desire to get back out there will likely be tempered by significant barriers: both ongoing epidemiological caution, but also lost habits. Many consumer behaviours will have taken a 12-18 month hiatus and have been replaced by new patterns, such as online grocery shopping. Overall, online retail has accelerated five or six years in one, and is now 30% of all retail sales. As such, retailers in particular will have to lure people back into stores. The role of in-store retail is not to replace online convenience, but rather to deepen brand engagement to secure the purchase.

→ Investment in experience is key:

stores need to communicate brand values, demonstrate a lifestyle, and above all spark desire.

→ Immersive tech:

visually striking new immersive display technologies, such as augmented reality, large-scale projections, interactive displays and holograms can feed this consumer desire for spectacle and sensory immersion.

High streets, shopping centers, commercial landlords and local councils will also need to act collectively in order to drive footfall and re-engage people with city centre space. Instead of simply 'going into town' as a functional, transactional experience, this too needs to have a bigger story of being immersed in community and the local area. Public and private bodies must work together to develop pedestrian shopping districts with plenty of outdoor seating, evening lighting, and display and performance areas (e.g. screening the 2021 Olympics) - and also reform licensing and land use to allow for primarily outdoor leisure and entertainment. This year is an opportunity to think radically about what could be possible, without being bounded in the small, incremental steps of what has gone before. What might a truly revitalised outdoor public realm look like?





closer- commu- nities





**My social circle
is more of a
love triangle.
I keep it small
and acute.**



**-- Liza Koshy,
via Twitter**

The coronavirus pandemic was a seismic shock to our social relationships. In just a few days in March 2020, our habitual daily interactions with workplace colleagues, family and friends were disrupted - forced either into the virtual realm, or for millions on furlough or in closed industry sectors, severed entirely. With some northern UK cities in particular held in lockdown throughout the summer of 2020, many people are currently heading towards the 12-month mark without having seen family members and friends in the flesh, producing a building wave of loneliness and isolation.

Through this loss, coronavirus has reminded us of the importance of ‘community’ - whether that is a local community, social circles or groups of like-minded people - with sometimes mixed blessings.

Government instructed us to “bubble up” and keep our social circles small to reduce virus transmission, forcing people to spend more time solely with their household unit. Some welcomed the opportunity to see more of their partners and children; others fled cramped shared houses and flats to return to the parental family home. By and large, our daily exposure to diverse viewpoints has decreased. Those of us who were able retreated indoors and online,



digital communities substituting for lost IRL interaction and Reddit use up a massive 44% year-on-year. With audiences consuming a heavy diet of news media and social content, the “culture wars” instigated by right-wing columnists and opportunistic minor celebrities such as Lawrence Fox were exacerbated, potentially radicalising people’s political attitudes. Protests throughout the summer expressed tensions around British identity, history, and freedom - and the anti-Semitic QAnon conspiracy theory gained an alarming foothold in the UK.

Closer Communities, then, is a trend about decidedly mixed blessings: the same engagement-maximising social media algorithms that help teenagers find their niche TikTok communities, are feeding extremist attitudes among older generations on Facebook. In 2021, we need to find new ways to come together.

What we saw in 2020: TikTok Tribes

In 2019, culture writer Jia Tolentino spoke of the rise of “[Instagram face](#)”, the spookily-identikit, injectables-and-filter-enhanced look of the late 2010s. In 2016, Kyle Chayka had made the same point about design and interior decor rendered homogenous by global DTC brands and social media with his concept of “[Airspace](#)”. Yet in 2020, visual culture diverged sharply, as ultra-algorithmically personalised feeds on TikTok - the fastest-growing and most downloaded app of the year - produced a flourishing of niche visual tribes.

niche communities of the year. “Everyone has a different TikTok experience,” they note, “tailored to what piques their unique interests. For some that’s plant parenting or sketching anime, for others it’s the fantasy of cottagecore and the theatre.

Whatever you’re interested in, no matter how common or obscure, on TikTok you can find and connect with a community that shares your passion.”

Their top 10 communities certainly demonstrated this diversity of interests, and proved how this shortform video app has developed far beyond lip-syncing and dance routines.



In their [2020 annual round-up](#), the media company reported on its Top 10

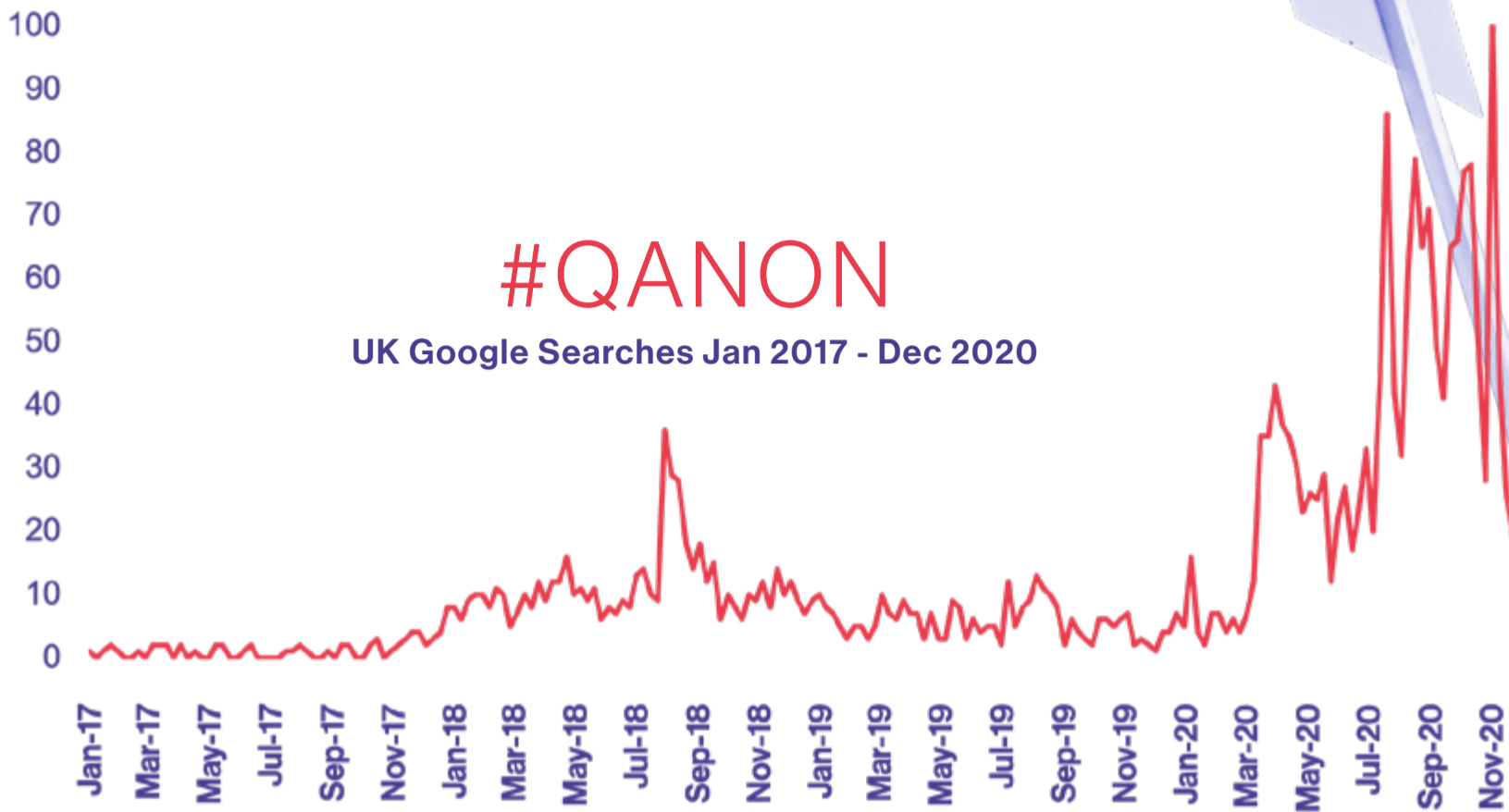
**TikTok has taught
us there is
truly a tribe
for everyone.**



-- Ann Friedman,
Journalist

Top 10 communities

1. [#AltTikTok](#) - You’ve landed on Alt TikTok.
2. [#WitchTok](#) - The community that cast a spell on us in 2020.
3. [#DracoTok](#) - Scared Potter?
4. [#CottageCore](#) - The peaceful simple life aesthetic.
5. [#RugTikTok](#) - Where every rug is a winner!
6. [#ArtTikTok](#) - Mesmerizing art for all.
7. [#PlantTok](#) - Because plants need love too.
8. [#TheatreKids](#) - My way. My way to Broadway!
9. [#HolidayTikTok](#) - Where the season officially starts on November 2.
10. [#AnimeTikTok](#) - Welcome to the secret anime society.



What we saw in 2020: Political Radicalisation

Unfortunately it was not only fun, pop-video culture that fragmented in 2020: instead, Britain's political culture, already divided into two vocal camps of 'Remainers' and 'Brexiters', continued to remain polarised throughout the year.

Public health questions of mask-wearing and public gathering became identitarian battles between doctors, "covidots" and anti-mask protestors. Interest in QAnon, the discredited far-right American conspiracy theory about Satanist, sex-trafficking political elites, spiked sharply in the UK in the week commencing 15 March, the beginning of lockdown - and continued to peak in July through November as supposedly 'anti child trafficking' protests were held in some parts of the UK. A number of wellness influencers started advocating QAnon concepts and anti-vaccination sentiments, as "conspirituality" gathered pace (a term coined by anthropologists Charlotte Ward and David Voas, who noticed that people with spiritual or alternative beliefs are especially prone to conspiracy-like thinking.) Had your yoga teacher been radicalised? It was a disquieting thought.

Debates about British heritage and culture were another flashpoint. In June 2020, protestors toppled a statue of Bristol slave trader Edward Colston and threw it into the harbour, generating media

and public debate about how exactly Britain remembered colonialism and its crimes. University of Oxford staff and students called for the statue of Cecil Rhodes to fall - while right-wingers argued that not all history should be remembered, and sought to quash the National Trust from researching and educating on how colonialism and the slave trade had funded many of its properties.

2020 was a year in which our social lives were conducted online. With the government an unreliable (and often U-turning) source of information, social media was an essential source of information. Used wisely, it enabled millions to hear directly from epidemiologists and public health experts. A younger generation of white Britons educated themselves about racism through the proliferation of articles and Instagram slideshows on Black Lives Matter topics. Yet radicalisation and conspiracy theory were, also, the result.

As the world re-opens and we mix again in more diverse workplace and public environments; as younger and older family members meet again around the dinner table, there will be challenges ahead as these digitally-developed, fragmented political identities have to reintegrate into the wider social world.

What's coming: Social Repair

A 2018 study by communications professor [Jeffrey A. Hall](#) calculated that, on average, it takes about 50 hours of time with someone over a three-month period before you consider them a casual friend, 90 hours before you become real friends, and about 200 hours to become close friends. "Friendships, however, require the investment of considerable time to create and maintain," notes evolutionary psychologist [Robin Dunbar](#), writing in response to the coronavirus pandemic. He cites research showing that "the emotional quality of a friendship depends directly on the time invested in a given social link", and that "the emotional quality of a relationship declines rapidly if contact rates drop below those appropriate to the relationship quality".

The damage the coronavirus pandemic will have done to our social networks clearly follows. We may have worked to transfer our closest half-dozen friend and family relationships to new virtual forms - but coronavirus has halted many of our looser acquaintanceships and 'weak social ties' that provide a valuable feeling of connectedness and information, both personally and in the workplace. Psychologist [Marisa G. Franco](#) says that most of us lose friends, "not because we don't like each other, but because we get busy and things just fizzle out". If these connections are not renewed in 2021 they will likely wither for good, leaving people vulnerable to a host of longer term consequences; not just loneliness, but adverse health and economic impacts too.

2021 is a year, therefore, in which we will all need to make conscious efforts to maintain and rebuild our relationships with the wider network of people who matter to us.

2021

Jan

Nineteen Eighty-Four and Animal Farm out of UK copyright, 1 January

George Orwell's endlessly relevant dystopian sci-fi and political allegory provide rich pickings for modern social commentators

Feb

IPO of dating app Bumble, February

Rumoured to be coming around Valentine's Day, female-centric dating app Bumble launches its IPO in February

Mar

Robin Dunbar releases book on friendship, 4 March

The University of Oxford psychologist and creator of the 'Dunbar number' releases 'Friends: Understanding the Power of our Most Important Relationships'

Apr

Minneapolis police trial for death of George Floyd, 8 March

Preliminary date set for trial of four police officers at the scene of George Floyd's death

May

Anniversary of George Floyd's death, 25 May

Activists will doubtless take to the streets again, one year on from the death of George Floyd at the hands of the Minneapolis police, turning attention to civil rights and social justice

Jul

100 years since Tulsa Race Massacre, 31 May – 1 June

Oklahoma has already begun events in remembrance of the single worst act of racial violence in US history: the massacre and destruction of "Black Wall Street" in Tulsa, Oklahoma, in 1921

Jun

Aug

Imperial Lates Online: Staying Connected, part of London Tech Week, 1-6 September

Imperial college hosts a week-long virtual programme of events exploring human connection in the age of technology

Sept

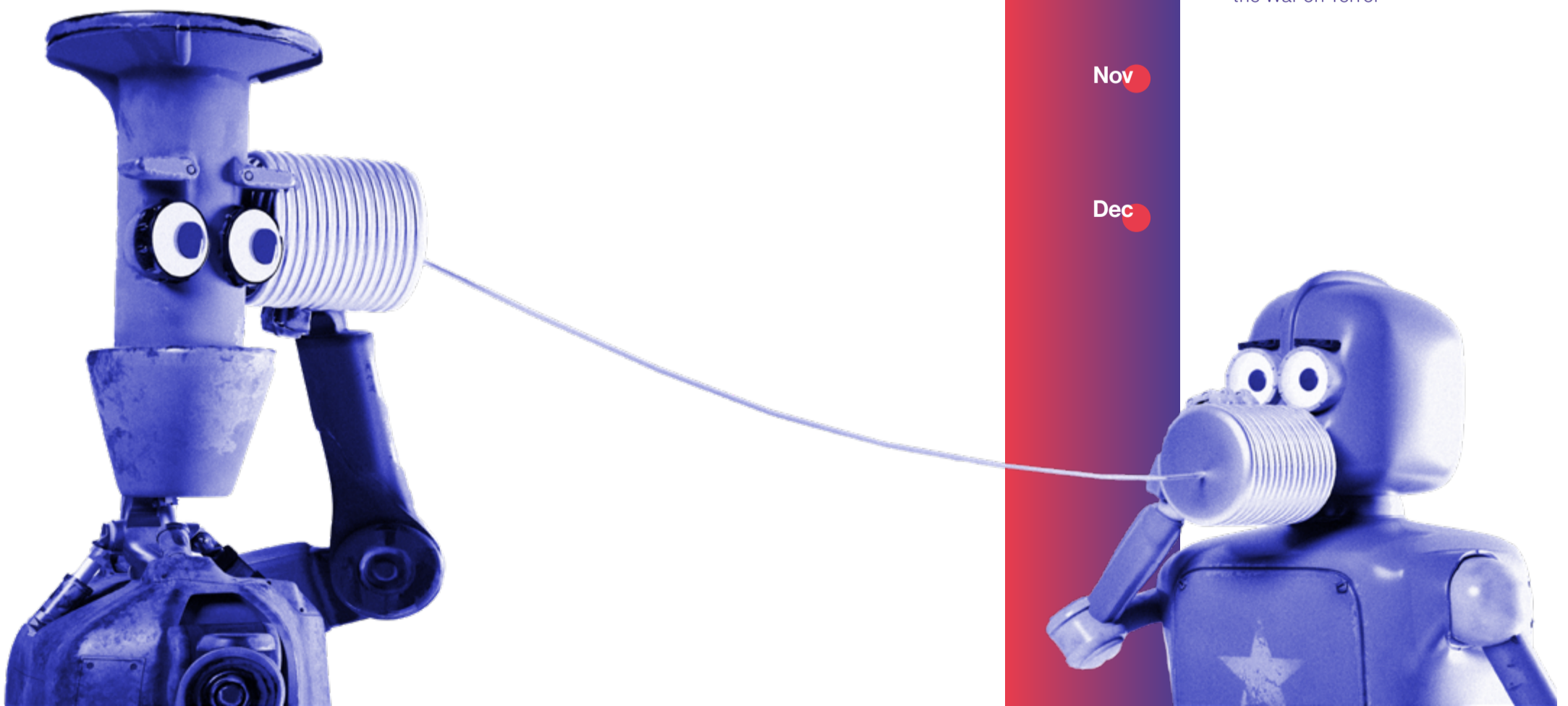
BBC to release 9/11: The Twenty Year Anniversary, September 2021

The BBC have commissioned a feature length documentary on the 9/11 attacks in New York, probing the impact of 20 years of the War on Terror

Oct

Nov

Dec



Implications for brands

→ **Wishy-washy messaging no longer cuts it:**

the expectation that brands should have a position on social and political issues is no longer restricted only to 'activist brands' such as Lush. Know who your audience is and take a real position.

→ **Check your ads:**

ensure advertising keyword blacklists aren't actually blocking your ads being displayed against the topics Millennials and Gen Z are most passionate about. Update your brand safety playbooks using services such as Check My Ads.

→ **Preparation is key:**

all kinds of brands need to be ready to moderate polarised discussion on social media comments and Instagram. Build teams, processes and guidelines in advance of issues flaring up.

→ **Jump on Tiktok's absurdist bandwagon:**

in 2020, Tiktok's slapstick comedy style made the 'weird internet' the new mainstream. Advertising and marketing content should take advantage of this space for goofiness and experimentation as a means to revitalise brands.

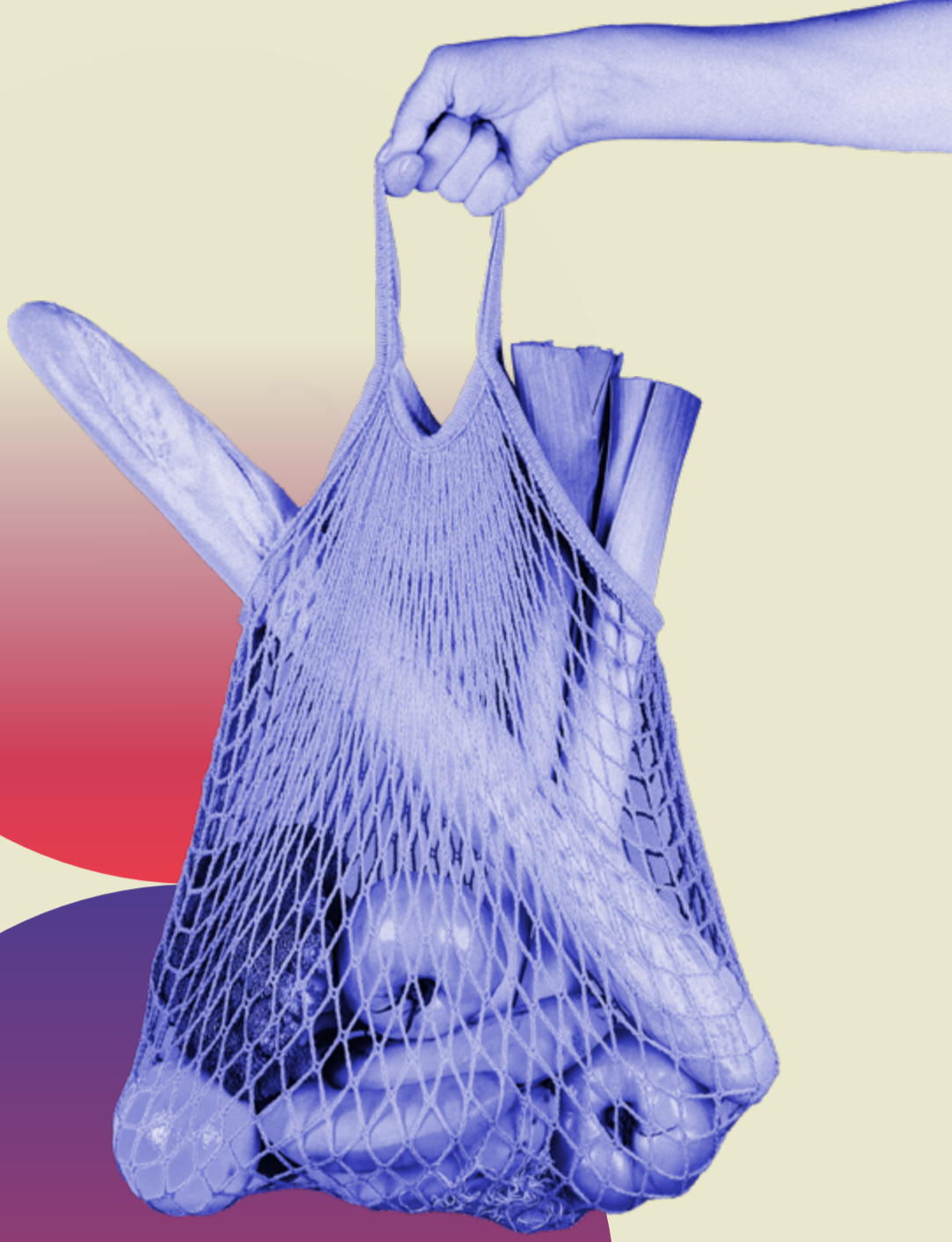
→ **Help reconnections happen:**

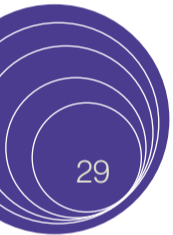
companies can help by offering promotions to 'invite a +1' or 'introduce a friend' at discounted rates, to help give us a reason to reach out.





local lives





“ The coalescing and galvanizing of small groups of people who share affinities. ”

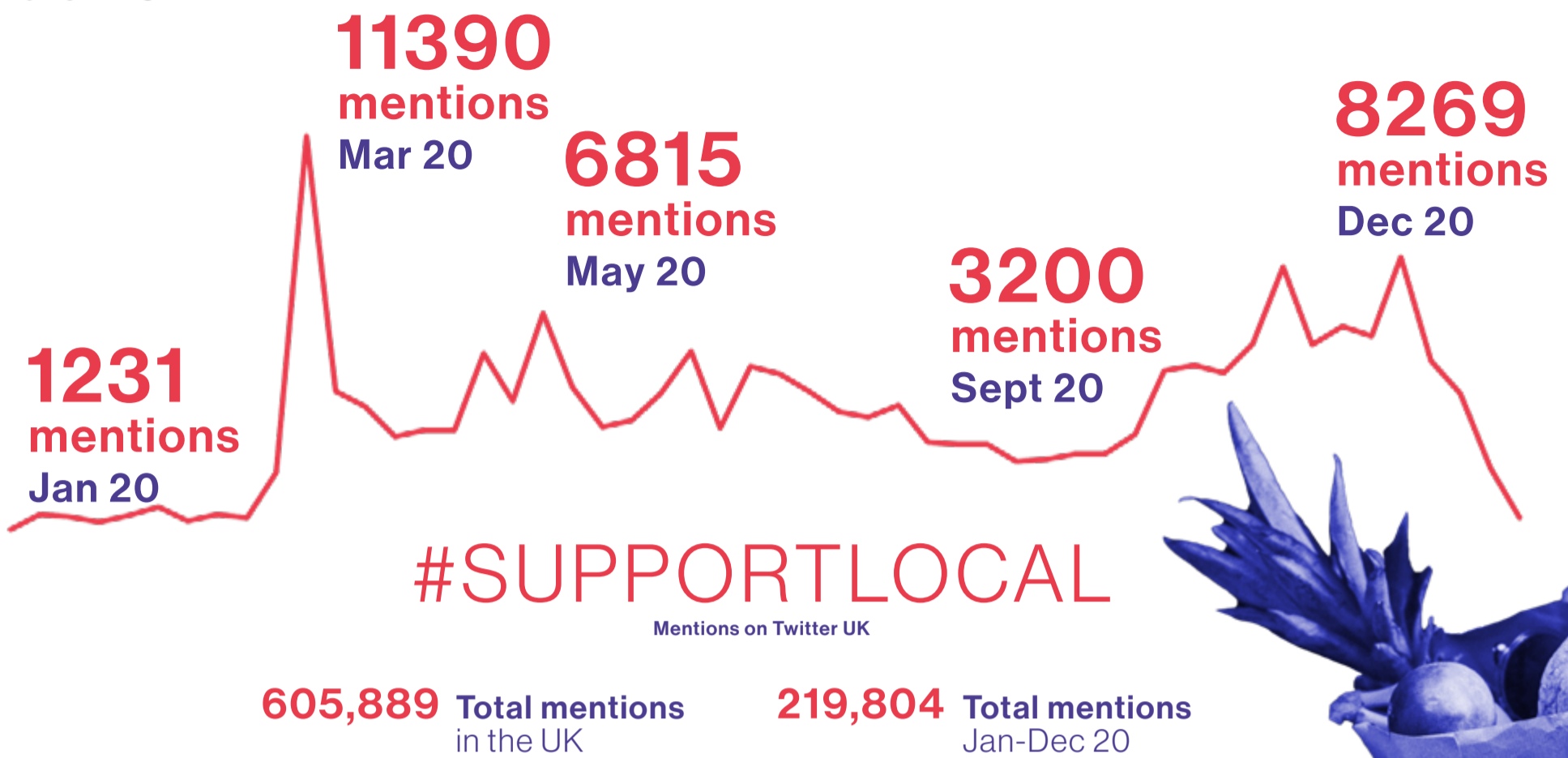
-- PRQ, Part II

The positive flipside of the narrowed horizons discussed in Trend #4 Tighter Tribes, above, is a resurgence of engagement in our local neighbourhoods and communities.

Community support groups set up at street and village level to support those who were shielding have in many cases blossomed into revitalised voluntary sectors, with people stepping up to support their communities through donations, food banks, wellbeing checks and voluntary work. No longer commuting, we have rediscovered our local high streets, greengrocers and cafés. City centre bars and restaurants may be struggling from loss of weekday footfall, but those in more suburban locations have thrived during summer and autumn 2020, when they were able to open.

Geographically our lives are re-orienting to new centres, new patterns of mobility, and new scales. It is a return to localism.





What we saw in 2020: Support Local

2020 saw a total of 605,889 Twitter mentions of #supportlocal or “supporting local” businesses and high streets in the UK.

The hashtag #supportlocal was already in occasional use before the pandemic, but discussion spiked in line with the outbreak of coronavirus in March. Since April, activity has sustained at over twice

the initial level, demonstrating the stability of this shift in awareness.

Local councils hopped on the trend throughout the year (and particularly in the run-up to Christmas), running district-level campaigns in conjunction with local media to encourage people to shop locally and keep high streets alive.

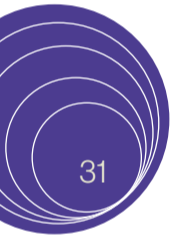
“
**We need to
reinvent the
idea of
proximity...**



-- Carlos Moreno,
Professor

... “we know it is better for people to work near to where they live, and if they can go shopping nearby and have the leisure and services they need around them too, it allows them to have a more tranquil existence”





What's coming: The 15 Minute City

There is widespread speculation about how this sudden leap forward in remote work may reshape the city of the 2020s. The UK's sharp rise in house prices during 2020 indicates how many people have made the move to somewhere greener, more spacious and more remote. Nonetheless, a majority of jobs remain necessarily face-to-face, and most of us in office-based professions are likely to remain office-based for at least a couple of days a week.

Urbanists are advocating for a new geography: the "ville du quart d'heure" or the quarter-hour city. The concept originated in Paris, with mayor Anne Hidalgo championing the concept that aims to offer Parisians what they need on, or, near their doorstep, to ensure an "ecological transformation" of the capital. The city is perceived no longer as a hub-and-spoke model focusing on travel into an urban centre, but rather as a collection of neighbourhoods, each offering everything you might need within 15 minutes travel time on foot, by bicycle, or by public transit.

A city reorganised along '15 minute' lines would reduce pollution and stress, creating socially and economically mixed districts to improve overall quality of life for residents and visitors. Paris has already invested tens of millions of euros into redesigning busy, traffic-filled squares into green, pedestrianised plazas - and building an array of cycling routes across the city to encourage Parisians to ditch the auto entirely.

The idea is an attractive one, and spreading beyond Paris: [Bloomberg](#) reports that "Leaders in Barcelona, Detroit, London, Melbourne, Milan, and Portland, Ore., are all working toward similar visions." In the UK, Sustrans has promoted a very similar '[20 minute neighbourhood principle](#)' that has seen cities such as Glasgow invest in producing new cycle routes and greening pavements and car parks into micro 'parklets'.

As we have discussed in Trend #3, Immersive Experiences, there is a need to make retail districts more attractive, vibrant places to spend time if they are to reclaim our interest (and our wallets) from online alternatives. The 15-Minute City is an exciting model for how this might be achieved.



2021

Jan

Feb

Mar

Apr

May

Jun

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Aug

Sept

Oct

Nov

Dec

First UK census since 2011, 21 March

An important measure of the UK's demography, this year's census will be the first conducted entirely online

London Mayoral Election, 6 May

Incumbent mayor Sadiq Khan is favourite to hold the position, following postponement of the 2020 mayoral election

Local elections in the UK, 6 May

UK local elections will provide a temperature gauge on sentiment towards PM Boris Johnson and perception of the government's handling of the coronavirus pandemic

Record Store Day, 12 June

After over a year of suspended touring, this year's RSD will be especially important in terms of financially supporting independent record labels and musicians

COP26 in Glasgow, 1-12 November

The UK hosts the 26th UN climate change conference in Glasgow, a city renowned for its commitment to sustainability

Small Business Saturday, 27 November

The virtual tour of 2020 returns, functioning as both a digital showcase for small businesses across the UK and a mentoring scheme for small business-owners

Implications for brands

→ **Plan ahead for the hybrid workweek:**

office-workers may not be back in the office for months, but companies need to be preparing clear guidelines to reassure staff through change. How many days is presence expected? Which meetings need to be face-to-face?

→ **Be led by user data, not what's worked before:**

many companies will be rethinking their locations in 2021, unfamiliar patterns such as local high street sites rebounding before city centres are likely, but it's bound to vary by business.

→ **Decentralised offices:**

companies may look to collaborate with others to create offices closer to people's homes, helping revitalise high streets and local areas.

→ **Facilitate greener, low-congestion options other than driving:**

make provisions for people to cycle to the office, shop or location, with secure bike parking and changing facilities. People want COVID-19-safe ways to travel.





Gaming Spotlight

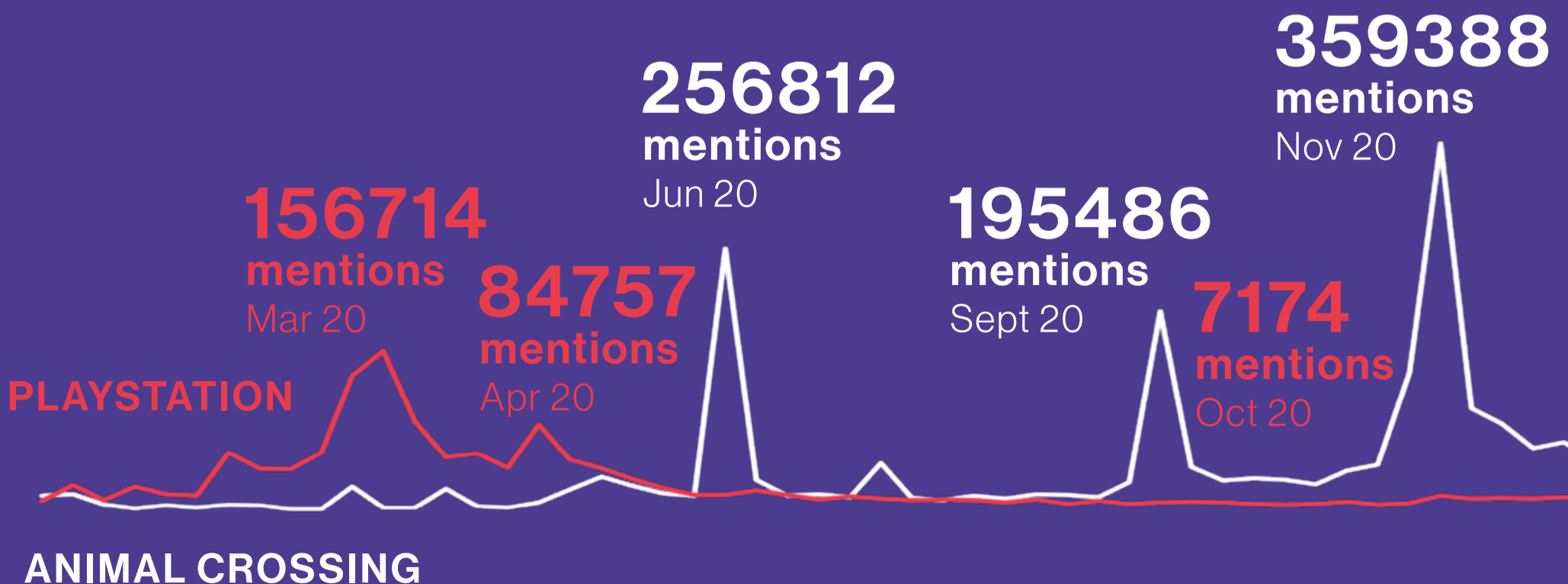
Video games have been a huge - if sometimes underestimated - industry for many years with bigger revenues than gaming. In 2019, sales of games and consoles hit \$152 billion in the US, vs. \$101 billion in the movie industry (combining box office and digital entertainment subscriptions). It's a similar story in the UK, with film box office receipts of £1.25 billion in 2019, dwarfed by £2.1bn in sales of physical games in 2020.

Over the course of the pandemic, games have matured as social and emotional experiences, with players seeking comfort and deeper community ties alongside entertainment, from their mobile apps, consoles and PCs.

Social data shows just how big this conversation is in the UK. Animal Crossing, the breakout game of Lockdown 1, saw a massive 1.40 million conversations, driven by people's love of the wholesome graphics, creativity and collaboration inherent in the game. Yet this was then blown out of the water by excitement around the Playstation 5 launch, which produced three massive spikes in social media buzz: 12th June 2020 was first images and game details, 16th September was the price announcement, and 19th November was release day, with a total of 1.95 million conversations in the UK alone.



The Playstation 5 was heralded as a particularly immersive experience (our #3 Trend), in part due to its innovative DualSense haptic-feedback controller, which lets the player literally feel games in new ways. Ray-tracing graphics finally arrived on consoles, producing astonishingly realistic light effects. This technology simulates the path an actual beam of light would take in the physical world, bouncing off objects, to produce shockingly life-like reflections and textured, gleaming surfaces. Fans describe new games for the platform such as Cyberpunk 77 as "the most beautiful immersive game ever played."





Games were particularly important this year because they provided a feeling of achievement at a time where such satisfactions were particularly hard-to-come by - demonstrating our Serious Play trend. Dr Matthew Barr, a lecturer in game studies at the University of Glasgow, concurred, describing how completing tasks within games provides a feeling of accomplishment without the anxiety or stress that real-life tasks can induce. "The stakes are lowered, but it still taps into that part of the brain where it feels like you're getting stuff done," he explained to [New York magazine](#). "You feel like you're in control."

A new narrative is developing about games: for some years they had been feared as somehow surely harmful to young people's health, despite a lack of robust evidence for this position. In October 2020, however, a breakthrough study from Oxford University - the first gaming study to work with actual gameplay data - found that people who played more games tended to report greater "wellbeing".

Another survey of parents by the [National Literacy Trust](#) found that 60% felt that communicating with family and friends as part of playing a video game during lockdown had been helpful for their child's mental wellbeing during this time. All that Animal Crossing this spring may well have been protective: as we say, having fun is seriously important.

Gamers have indeed got more serious about it too: [The Global Gaming Study: Impacts of COVID-19*](#) by consulting firm Simon-Kucher & Partners, surveyed over 13,000 people across 17 countries during May and June 2020, and found gamers were playing more video games (30% growth in those playing 5+ hours per week), spending more money on video games (39% growth), and more likely to identify as 'serious gamers' (jumping from 63% to 82%).

Significantly, gamers anticipated these behaviours largely persisting once coronavirus restrictions had lifted. Brands should explore opportunities in this space, from product placement in major gaming worlds, to even creating their own games - as we discuss further in the Retail Spotlight.



Video games give me a road map, a set of guidelines ...



-- Alanna Okun,
in Vox

...“a series of tasks I know I can complete even when the dishes in the real-life sink are stacked precariously high”





Retail Spotlight

Before COVID-19 hit, many of us embraced shopping online for its convenience, celebrating the service for allowing us to dodge big crowds, long queues and loud, repetitive in-store music. However, with cordoned off changing rooms, 'no touch' policies and the eventual closure of non-essential retail, this stripped-back in-store shopping experience made retail challenging and off-putting. Online retail couldn't entirely fill the gap: after a long day at the screen, did you really want to scroll through endless product listing pages online as a leisure activity? Enter: livestream shopping.

You thought the days of QVC were over? 2020 saw accelerated growth of live shopping events, with social media influencers or brand workers replicating the longed-for customer experience at physical shops by demonstrating products and engaging in open conversation, live streamed to audiences in real-time.

Social discussion in the UK increased by 274% in H2 2020, as livestream shopping offered consumers stuck at home many of the benefits they missed from shopping in-store: parasocial interaction, guidance, and a generous helping of the purchasing confidence typically lacking from shopping online.





Already booming in China with 60 million people tuning into shopping livestreams in March 2020, this is set to thrive in Europe and the US too.

Foundations are already in place: Amazon launched its livestreaming shopping platform, Amazon Live, in 2019; TikTok announced its global partnership with e-commerce platform Shopify in October 2020; and Facebook and Instagram have also been piloting their own versions of this experience.

Brands should look to pilot these tools in 2021: partner with influencers to find convivial hosts with a built-in fan base, and a cost-effective means of content production.

Fashion innovators are going beyond live-streaming, however, by tapping into gaming as a means of offering immersive brand experiences to mass audiences in a COVID-19-distanced world. In 2019, Louis Vuitton released a retro arcade-style game, Endless Runner and in December 2020, Balenciaga released their Fall 2021 collection as an immersive game, Afterworld: The Age of Tomorrow. The gameplay is limited, the experience more ambient: players simply follow a path of glowing arrows from a Balenciaga retail store, to a city street, then a series of abandoned concrete structures - before a white rabbit leads players through the forest to a secret rave. Characters wear high-resolution scans of new-season Balenciaga garments, demonstrating the brands creative vision in an eerie, futuristic and compelling manner.



Shoppable content will be massive!...

... "we'll def see converge of entertainment and e-com, esp as they need to fill the void of physical shops. Ents or content-led commerce will be the way. Alread moving towards it with Live Shopping and Shopify's partnership with Tik Tok"



**-- Kavya,
via Twitter**



To explore what these shifts in culture mean for your brand or business - or to discuss how our team and technologies could help your business adapt to the post-COVID -19 world, get in touch:

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