

CONNECTING THE TRENDS: NEW HUMANITY



INTRODUCTION

Spanning twelve months of research, Weber Shandwick identified 24 key global trends impacting the communications sector – and the larger movement underpinning them all. *Connecting The Trends: New Humanity* outlines the rising need for tangible, human-led experiences driving today's stakeholders.

It's likely our world has never undergone such a sustained period of drastic transformation as it's seen over the past ten years. From the widespread shift to video-based content, to pronounced shifts in politics, to a seemingly unstoppable onslaught of new consumer technologies, we presently exist in a veritable whirlwind of shifting concepts and developments.

For communicators, such high-velocity innovation can represent many difficulties. Even as one trend or development is fully grasped and leveraged, several more may arise to complicate matters. *Connecting The Trends: New Humanity* is an in-depth assessment of what threads are connecting and motivating today's transformations. And, in 2019, it seems many may have grown tired of the whirlwind.

UNDERNEATH IT ALL

Across all of the trends presently impacting brand communications, there exists a clear and unifying theme: **a demand for tangible, human-led authenticity.**

In many ways, it's a logical development. Weber Shandwick's 2018 global research survey repeatedly reinforced that community purpose was an increasingly vital part of contemporary business communications. Across global research covering government policy, consumer activism and conscious crowdsourcing, the message was abundantly clear.

“Whether discussing the need for greater engagement in the social media habits of CEOs or examining global economies, research keeps coming back to the crucial importance of values and purpose. Having a purpose beyond profit seems to be growing into the most valuable asset in the global marketplace. Not in an abstract, romantic sense – but in a concrete, fiscal sense.” – **2018 Trends: What The Research Says**



In 2019, the value of purpose beyond profit remains high. However, stakeholders are increasingly seeking a tangible experience of that sense of purpose. Furthermore, an experience catered to them and their needs, as opposed to an experience they need to seek out or tolerate by necessity. It's not enough for stakeholders to hear about a sense of purpose. They need to feel the difference.

“Right now, it's less about creating a series of messages to connect with a particular audience – and more about creating a series of connected, personal experiences. A series of experiences that creates a space wherein a stakeholder feels more safe; more in control,” says Ian Rumsby, chair, strategy, Asia Pacific.

“In a transformational era such as ours, giving stakeholders a sense of enhanced

control is one of the biggest drivers of behaviour.”

While such shifts are often presumed to apply largely to consumers, the majority of trends suggests this new reality is currently being experienced throughout all aspects of the global communications framework.

Professionals, for example, are seeking a more tangible, human-led relationship with their employer brands.

Business-to-Business services are growing increasingly more individualised. The transformation can be seen most clearly in the ongoing explosion of trends within three key areas of global industry: **Digital Gets Physical; Diversity, Equity & Inclusion; and Care & Support.**



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Chair, Strategy, Asia Pacific

DIGITAL GETS PHYSICAL

TECHNOLOGICAL EXPANSION

With the ever-increasing number of technologies transforming everyday life for consumers, brands and professionals alike, it's tempting to think of digitisation as a straightforward trajectory; a line from the concrete, actual world to the fluid, virtual one. And, at many times, that would be an accurate reading. But, not anymore.

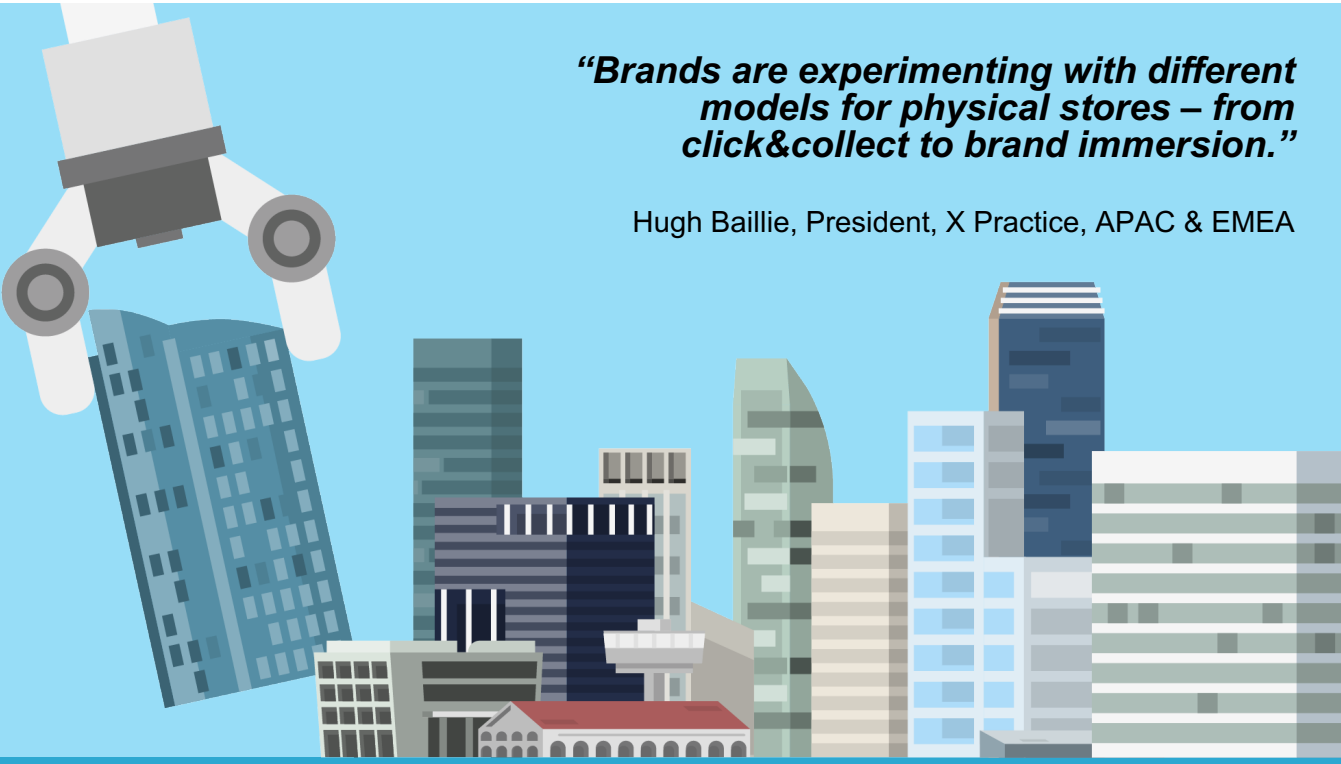
“Physical versus digital is no longer a clear-cut definition,” says Hugh Baillie, president, X Practice, APAC & EMEA. “Technologies such as beacons, image recognition, and connected stores are blurring the boundaries between on and offline retail as consumers increasingly expect a seamlessly integrated journey across all touchpoints. Brands are experimenting with different models for physical stores from click&collect, to brand immersion.”

The clearest example of this development would be the growth of hybrid retail store experiences. Over the past eighteen

months, the two biggest [online retailers in the world](#) have both either purchased major existing brick-and-mortar brands or opened their own physical locations in the past year. And, neither are abandoning the digital space.

However, that is simply the most literal manifestation of a greater shift towards more explicitly tangible, human-led technology. It's a shift that's occurring across all levels of technology engagement – from individual consumer levels, to mass communication devices, to government infrastructure projects and beyond.

On an immediate level, there's developments like the rapid growth of foldable technology. With six technology companies having either launched or announced a consumer-level product with a foldable screen in the past six months, consumers will soon be accustomed to technology that literally bends to accommodate their physical needs.


An illustration showing a stylized hand holding a smartphone, with a city skyline of various skyscrapers in the background. The hand and phone are on the left, and the city buildings are on the right, all set against a light blue background.

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And, many other technologies will soon follow suit. In 2019, experts are expecting to see significant growth in the popular applications of [voice-led technologies](#), [5G networking](#), [virtual/augmented reality](#), [artificial intelligence](#) and [blockchain](#).

And, this follows on from a suite of similar infrastructure technology projects like [governments adopting blockchain](#) or 'smart' [highways](#) and [stadiums](#). Crucially, these technologies, like folding devices and hybrid retail experiences, are all designed to make experiences more physically accessible and tangible –



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Emmanuel Caisse
Head of Analytics,
Asia Pacific

whether that’s buying a product, using an autonomous car or, in the context of cashless digital wallets, [accessing financial institutions](#) in remote or previously unserved locations.

The significance of the attitudes underpinning these changes should not be underestimated. In many ways, these innovations are being driven by what has been described as a tech backlash.

The suspected use of data analytics in terms of global politics and ongoing criticisms of platform mismanagement, for example, has [led to widespread discussions around public trust in social media](#).

This is in addition to [a resurgent trust in traditional print media](#), [a global decline in smartphone sales](#), a rising belief that companies are [prioritising online automation over customer experience](#) and [a growing percentage of young people re-evaluating social media](#). And, it’s not accounting for the long-accepted trend of [consumers growing more forgetful in the digital age](#).

Whether it’s necessarily a backlash or simply an evolution is open for debate. However, it’s clear attitudes to technology are undergoing significant change. And, in response, a movement has emerged to build more tangible, more memorable, and more human-led experiences around technology. It’s why many brands are starting to explore [multi-sensory branding approaches](#).

“With effectively limitless content being pushed at individuals, people are struggling to choose what to interact with in the limited amount of time available,” says Emmanuel Caisse, head of analytics, Asia Pacific. “Brands need to deliver a higher quality experience with their content. And, it’s important to remember – quality isn’t just measured in terms of emotional engagement but utility and familiarity, as well.”

INCREASING INCLUSIVITY

EMBRACING NEW AUDIENCES

Since the beginning of modern cinema, [only 39 films have grossed over a billion dollars at the global box office](#); 13% of those films were released in 2018. Of those, 60% were headlined or directed by people of colour. By contrast, over 80% of the total 39 were directed by white men. The [highest grossing \(non-sequel\) film of 2019](#) so far, is headlined and co-directed by a woman.

From a pop-culture standpoint, mainstream audiences have never been more receptive to diverse stories and creators. However, like many trends, such a development is merely symptomatic of a much larger shift. Worldwide, new and influential audiences are emerging at an accelerated rate and helping drive transformation across a variety of industries and markets. The broadest and most significant of these new audiences are generational shifts.

By 2020, Millennials will have more spending power than any other generation; [approximately US\\$13 trillion worldwide](#). It's currently projected Millennials will represent the most economically significant generation until at least 2035, if not longer.

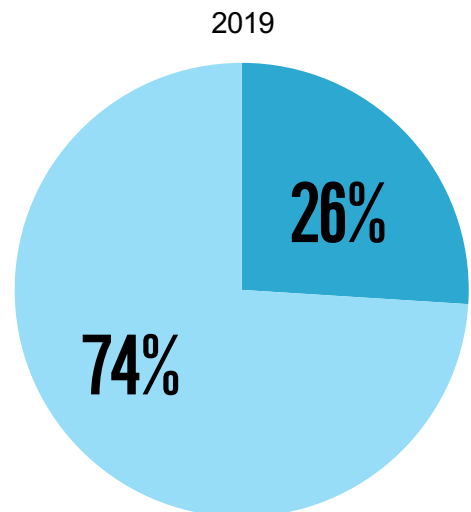
Concurrently, Generation Z are experiencing their own commercial advent. Loosely identified as those born between the mid-1990s and mid-2000s, Generation Z consumers currently make up 26% of the population and have a global spending power of roughly US\$44 billion. In 2019, Generation Z will grow to encompass [a third of the global population](#).

"Brands, organisations, and companies in general are very much trying to understand Millennials and Generation Z," says Vanessa Ho, chair, client services, Asia Pacific.

GENERATION Z

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Statistics: [Bloomberg, Gen Z Is Set to Outnumber Millennials Within a Year, 2018](#)



■ Rest of the World ■ Millennials

Ho continues, “They’re trying to understand them as their existing and future customers but also trying to understand them to recruit them as professionals. They’re working hard to connect with these demographics – and I think, as a result, many sectors have changed.”

The growth of these two distinct populations has profound flow-on effects on the expansion and recognition of several other diverse audiences. For example, it’s anticipated that the once-niche pursuit of professional competitive videogaming will be drawing in more than [US\\$1.6 billion](#) worldwide by 2021; a growth driven predominantly by [Generation Z and Millennials](#).

Similarly, the global travel sector is currently adapting to the rise of influential new demographics. As we approach 2020, for example, it’s expected Muslims will spend over [US\\$157 billion worldwide](#) on travel

and tourism – with most of those travellers being Millennials. The most significant development, however, is a general push for diverse representation across all sectors. While Generation Z and Millennials may differ in areas like modes of [media consumption](#), their socio-political values are largely aligned, [especially around matters of diversity](#). This doesn’t just translate to consumer behaviours but also to [talent considerations for businesses](#).

“Reputation building is classically built on several dimensions: having high quality products/services, strong financial performance, deep talent, authentic leadership, sustainable corporate responsibility, global effectiveness and innovativeness. Recently, several new factors have emerged,” explains Leslie Gaines-Ross, chief reputation strategist, global. “One of the more significant is a company’s commitment to diversity and inclusion.”

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“This factor is critical to today’s reputation management ecosystem. From [our own research](#), it’s clear that this sought-after demographic wants to work in diverse workplaces. It is a prime factor in what they look for in an employer. Companies are increasingly devoting more resources to building diverse workplaces and hiring Chief Diversity and Inclusion Officers to implement meaningful programmes.”

It’s a push that’s even mirrored in the anticipated shift towards micro-, nano- and squad influencer marketing. Whereas influencer marketing has typically oscillated around followers in the millions, 2019’s tactics are expected to focus on more granular targeting through building a community of influencers with [followers numbering in the hundreds or thousands](#).

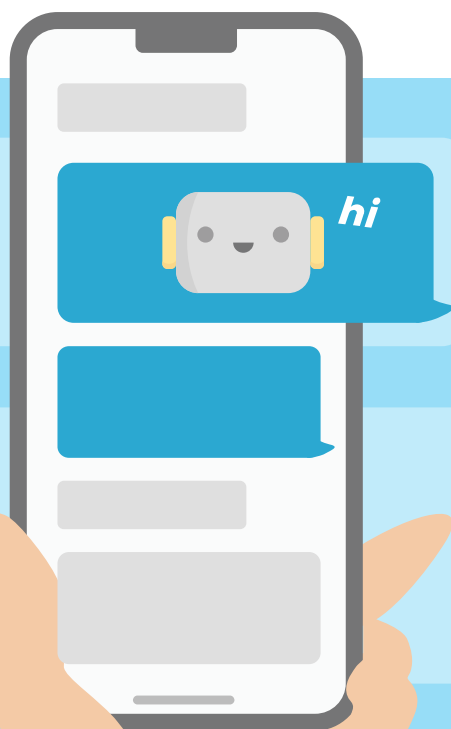
Worldwide, today’s generations are championing brands, media and

workplaces showcasing a genuine connection to, and investment in, the diverse populations in their community.

Unlike previous diversity conversations for many audiences, it’s no longer simply about representation – but tangible, lasting relationships and ethically responsible conduct.

“You can’t homogenise a message and hope to connect with different audiences. In advising clients, we always advise them to be truthful and tell their story,” says Daniela Braun, head of technology, Brazil. “Specifically, tell the story of people who make your brand become what it is and what you have been doing for your audience, honestly and respectfully.

“You must be genuine. In Latin America, a brand cannot reach a Colombian consumer by simply replicating a Brazilian approach, for example. There are different cultures with different needs.”



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THE NEW HEALTHCARE PERSPECTIVE

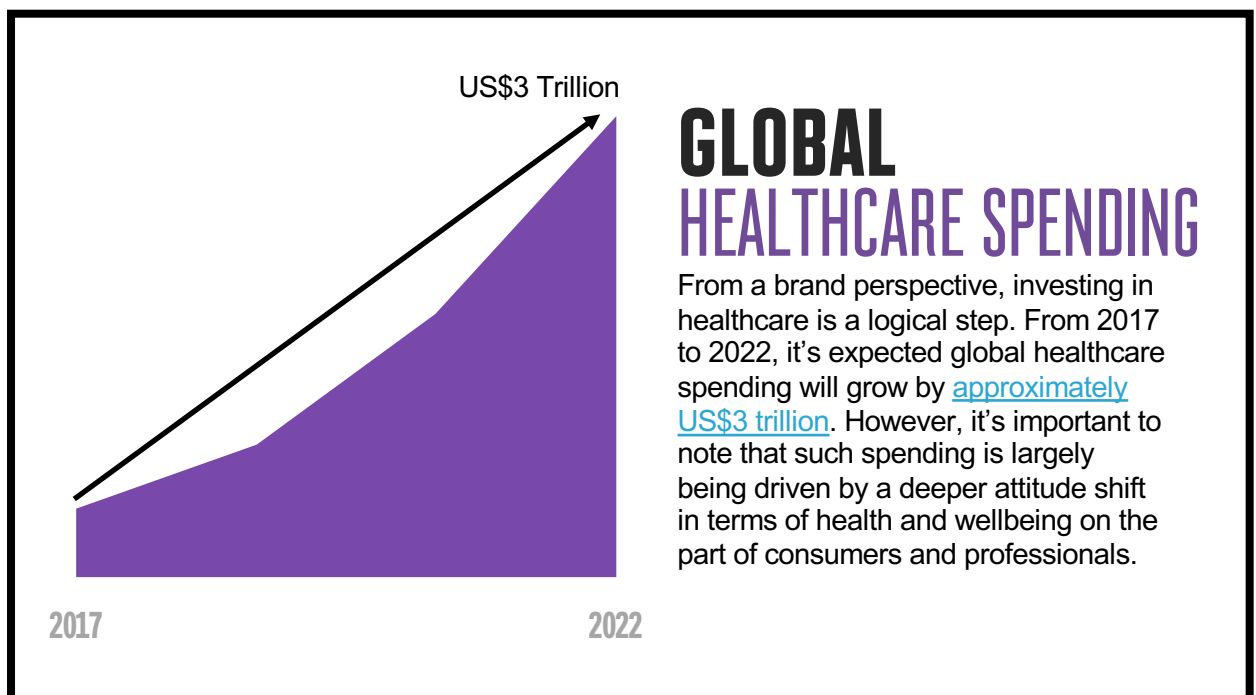
THE NEW CURRENCY OF HEALTH, WELLBEING & SELF-CARE

In 2018, one of the world's leading consumer tech brands collaborated with a major university to conduct a study on heart health. Specifically, atrial fibrillation. At 400,000 participants, it stands as [the largest study on atrial fibrillation ever conducted](#). It's one of several recent developments to emphasise the growing significance of health and wellbeing for today's global populations.

Many major consumer technology brands, for example, are [rapidly expanding into areas of healthcare and wellbeing](#). This includes employing [patient-facing products to aid in disease research](#), leveraging existing databases to create [better treatment strategies for patients](#), and using existing online delivery infrastructures to develop [more effective supply lines for medical resources](#). In terms of the most traditional definition of healthcare, millennials and younger generations are taking a much more active and critical stance.

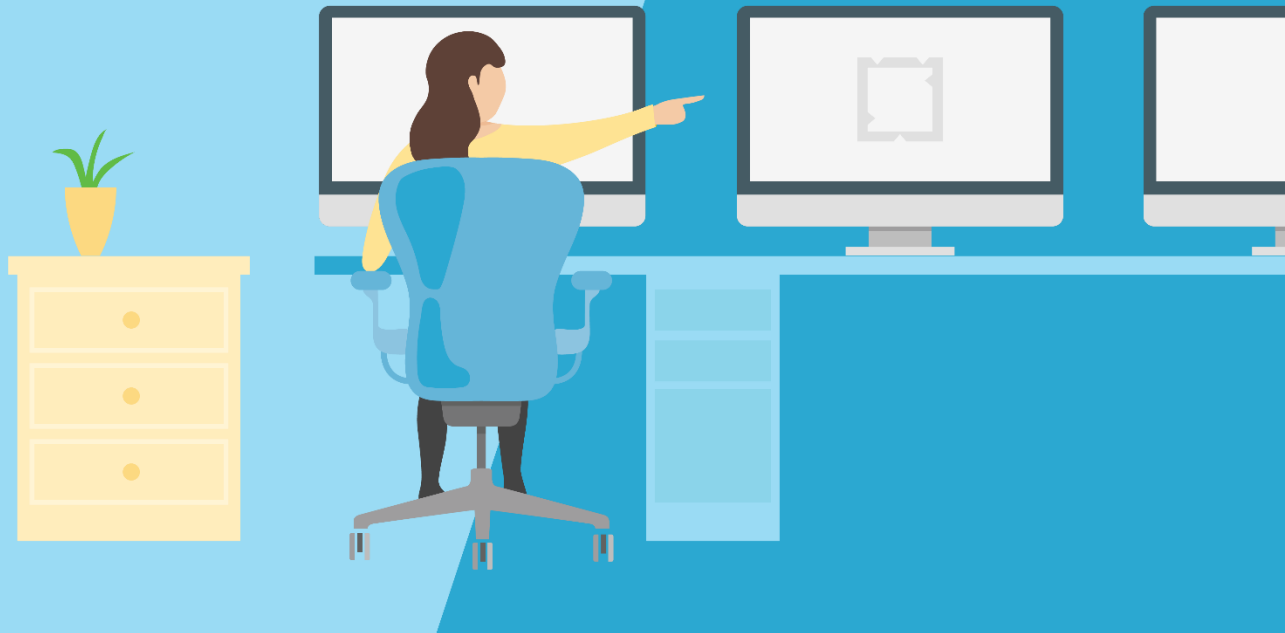
A recent American study conducted by Weber Shandwick found that, of all generations, millennials were [most likely to trust online information over their doctor's advice](#). This has translated to a widespread increase in investment in ideas of holistic health, wellbeing and security – impacting even sectors seemingly removed from healthcare or pharmaceuticals. There is increased pressure on employers, for example, to foster more flexible and supportive workplaces in order to attract and retain talent. As of 2018, [70% of professionals worldwide](#) reported working remotely at least once per week – and more than half telecommuted for the majority of their work.

This transition to less-traditional approaches has only been encouraged by Millennials; [50% of whom](#) would leave their current role for a position that allowed them to work remotely on a regular basis.



GLOBAL HEALTHCARE SPENDING

From a brand perspective, investing in healthcare is a logical step. From 2017 to 2022, it's expected global healthcare spending will grow by [approximately US\\$3 trillion](#). However, it's important to note that such spending is largely being driven by a deeper attitude shift in terms of health and wellbeing on the part of consumers and professionals.

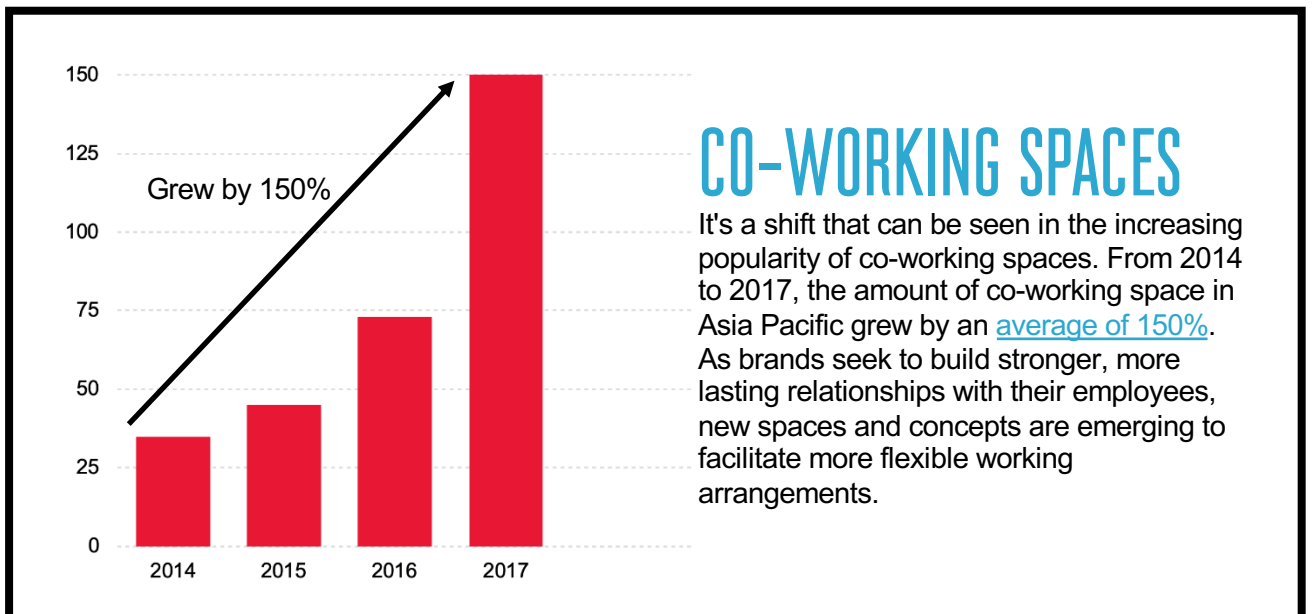


Even within more traditional work spaces, employees are looking to employers who champion [values](#) and provide safe, civil environments for their people. Our surveys on civility from both [2017](#) and [2018](#) have found that most Americans view their workplace as a sole bastion of civility in an increasingly uncivil world.

“Without a doubt, the emphasis on health and well-being is impacting the workplace – and not just health-oriented spaces,” says Gaines-Ross. “Many companies are focused on building cultures that provide better work/life

balance, longer maternity/paternity leave, time off for tending to elders, stress reduction activities such as yoga and meditation classes, exercise opportunities, etcetera.”

Across the board, consumers and professionals are less and less inclined to compromise or deprioritise their values or wellbeing. The majority of today’s demographics are seeking out brands, organisations and technologies that demonstrably (and consistently) care for their wellbeing and that of the world around them. It’s why 2019 has been dubbed [the year of plant-based meats](#).



CONCLUSION

ALL IN THE MIX

Taking all of the data in its entirety, it's emphatically clear: **stakeholders across the world are desperate for more tangible, human-led experiences.**

Whether that's in the retail space, from their healthcare providers, from their technology, or from their employers. Whatever our context, we are all seeking a *New Humanity*.

In some ways, it's a search for authenticity in a world recently typified by misinformation and uncertainty. Or, a need for genuine connection after a decade of increasingly abstracted relationships. However, the crucial differentiator of the phenomenon is its universality. It's not a discreet outcome of a specific trend or region but a reflection

of a larger reality. The impact range of many of the highlighted trends, for example, spans even further than the provided framework. Our collective prioritising of health and wellbeing, by way of demonstration, has been significantly influenced by both new audience developments and shifts in attitudes towards technology. The acceleration of technology has allowed for more ethical consumerism.

At the heart, it's a very organic need. Amidst a whirlwind of change and transformation, we reach out to our people to find comfort, security and inspiration.

In a new environment, we reach out for a *New Humanity*.



From São Paulo to Sydney – the Weber Shandwick panel

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From APAC automation to Generation Z's zenith – The Data

[Trends in Two Minutes](#) is a monthly bulletin from Weber Shandwick's Asia Pacific experts. Each instalment provides an essential overview of a handful of key developments impacting communications in the APAC marketplace. Spanning all sectors, the research behind a single instalment can stretch across hundreds of sources – from academia to media to market surveys.

Over the past twelve months, [Trends in Two Minutes](#) identified **24** key trends in the Asia Pacific communications sector:

Fighting Fake Data with Analytics

Transport Innovation in Asia

Sleep's New Currency

New Travel Demographics

Supportive Workplaces

Forgetful Consumers

The New Retail Space

Smart Stadiums

Millennials vs Gen Z

Blockchain in Asia Pacific

Multi-Screen Storytelling

Emerging Consumer Healthcare Technology

Rise of Esports

CEO Activism in Tech Professionals

Co-Working Spaces

Ethical Consumerism

Intuitive Technology

The New Digital Backlash

Audible Branding

Foldable Technology

Rising Impact of Automation

New Wallets & Cashless Economies

Decentralised Influencers

AI Consumer Attitudes

Connecting The Trends: New Humanity combines the existing research that identified each trend with new findings and insights to outline the global phenomenon motivating each development – a widespread need for a new human-led reality.



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