AUTHENTIC INSIGHTS: THE CULTURE GAP

Global Report 2022
INTRODUCING GENERATION DIVIDED
An exploration of society and how we bridge divisions
Learn about the new Generation Divided (Gen D) and what makes them tick: who they are, how they see the world and their expectations for communicators.

Unpack how Gen D navigates and views key market sectors – sports, healthcare, media, food and beverage, politics and employee engagement – as individuals and communities.

Hear from acclaimed author and Columbia University lecturer, Kai D. Wright, and our approach for communicators to build highly effective campaigns that resonate and inspire action.
What we’ve found is that to understand society’s true dimensions, we need to move away from standard demographic splits based on age and gender, and instead look to identify communities through commonalities across a range of factors. The inclusion of socioeconomic indicators, gender identity, religious beliefs and political leanings ensure that all aspects of humanity are reflected via a mindset within our research.

This mindset is an evolution of, and response to, the findings of our previous report, Togetherness Economy.

Exploring this divide will spotlight not only how brands and businesses can gain a deeper understanding of culture but include outlooks which can act as a springboard to strengthen reputation and help brands stay culturally relevant without losing authenticity.

As the world becomes more multicultural, intersectionality is pushing brands to evaluate whether demographic-based strategies work best for business relevance and growth.

Brand and business decision-makers must balance growth imperatives with the greater necessity to operate in an inclusive, ethical and empowering manner. Increasingly, audiences expect their employers, favorite brands and large institutions to learn how to both navigate culture and help solve societal issues.

In this year’s edition of FleishmanHillard’s Authentic Insights report, we unpack a new generation, Generation Divided, to help brands and businesses understand how to bridge the current cultural divide. Our study builds on global insights to highlight the new cultural dividers that govern society, showing a tactical way forward for brands and businesses to connect and empower the people and communities they serve.
INTRODUCING GENERATION DIVIDED

“Be global, but think of the planet and don’t travel. Be vegan, but don’t go over-green. Have an opinion and be active, but don’t offend anyone. Embrace other cultures, but don’t appropriate. Compete against others, but we’re all winners and equal. Be yourself online, but promote yourself and your hustle.”

People aren’t just divided within communities; they are divided within themselves. An internal state of flux on what’s right and what’s not is underway within us all. People are struggling to be honest with themselves and their actions, feeling a disconnect between what they’re told they truly care about, and what they honestly do in reality. Our moral compass on decision-making is in full swing — influenced by the state of division around us.

In short, we are living in a polarized world on both a global and individual level. Algorithms are creating echo chambers in our consumption of news feeds, and media agendas driving public opinion and brand action are only the tip of the iceberg. Our survey revealed that the proportion of people who believe brands should be ‘bold and brave’ versus ‘sensible and conservative’ was almost split equally (58% versus 56%), so it’s no wonder brands and organizations aren’t always sure how to make positive steps forward to eradicate these issues.

And it’s not so much that our views are diverging, but that our differences of opinion have become far more visible. The fact is that people today are much less confined to ideological bubbles than they were in the past; this has contributed significantly to the evolution of today’s Generation Divided.

Fake news is now evolving into deepfake videos, and we may not even be able to fully trust what we can see in the near future. The metaverse is promising a virtual ocean of possibilities, but within those possibilities still lie the dangers of such a vast and (as of yet) unestablished space. In terms of what the future holds, we know the direction, but the full picture of what we will find is yet to be determined — all the more reason to prepare and establish expectations, anticipate change and be part of that shift before it engulfs you.

The one constant we can rely on is change. With technological innovations promising to drastically alter our everyday realities and prospects, our vital, modern-day issues of diversity, equity and inclusion will be in need of safeguarding and consistent reevaluation.

In an era of heightened cultural sensitivity and with new communities emerging every day, brands and organizations must keep pace with the major societal themes of our time to protect their reputation.

PREVIOUS GENERATIONS OFTEN LIVED OUT THEIR WHOLE LIVES IN THE SAME TOWN, ATTENDED THE SAME PLACE OF WORSHIP, LISTENED TO THE SAME TEACHING, READ THE SAME NEWSPAPERS, CHATED TO LIKE-MINDED PEOPLE AND SOUNDED THE SAME. THEY SHARED THE SAME OPINIONS.

In an era of heightened cultural sensitivity and with new communities emerging every day, brands and organizations must keep pace with the major societal themes of our time to protect their reputation.

48% believe it’s becoming more difficult to get along with people who hold contrasting views.

EXPLORATION INDEFINITE GENERATION DIVIDED
ON A MACRO LEVEL, WE’VE SEEN THEMES AND TRAITS IN OUR AUDIENCE SEGMENTS, AND OUR RESEARCH HAS HELPED SURFACE GEN D’S TRAITS.

To cater to Gen D, your campaign must take into account and deliver against one of these internal dilemmas. If it doesn’t, START AGAIN and look deeper into what is holding them back.

**Baby Boomers**
- Idealism

**Gen X**
- Materialism

**Millennials**
- Globalist mentality

**Gen Z**
- Undefined ID

**COMPLEXITY NORM**
Gen D’s Michael Dwyer and author to our hybrid of growing and living in today’s hyper connected world. Gen D’s expanding social norms and values are changing them from what marketers have known from past and even current. So longer and more quickly conversations in the future are essential and in Gen D’s. Gen D’s are conscious of the inner and outer world by the same time and communication is more transparent than ever before. The Gen D’s are act now, swim later.

**LAYERED REALITY**
Gen D’s lifestyle and lives to suit our hybrid of growing and living in today’s hyper connected world. Gen D’s are conscious of the inner and outer world by the same time and communication is more transparent than ever before. The Gen D’s are act now, swim later.

**AMBIGUITY AMBIGUITY**
Not to be mistaken for a lack of ambition, Gen D are experiencing an alternative form of ambition — being on the journey of self-discovery and exploration. Gen D’s are known for being “rich in thought” yet “poor in action.” They are known for the internal and external dialects and conversations occurring behind the scenes in Gen D’s businesses. It is often mislabeled to Gen D’s view and the aspiration.

**INFORMATION RESTRAINT**
With such an abundance of information, perspectives and conflicts occurring in the culture gap, Gen D’s are fact-seeking and formulating their own opinions. Gen D are the keepers of reliable information sources. They keep in touch with each other’s news. They are the keepers of reliable information sources. Reliable information will be more important than ever in order to cross our culture gaps today and tomorrow.

*Authentic Insights Global Report 2022*
Language is a collection of terms that originate from communities, each term having a meaning and context often historically eroded over time. In summer 2022, the 140-year-old Oxford English Dictionary announced plans to add a new glossary — the Oxford Dictionary of African American English — by 2025. Harvard professor, renowned historian and newly named editor of the African American Vernacular (AAVE) dictionary, Henry Louis Gates Jr., noted “every speaker of American English borrows heavily from words invented by African Americans, whether they know it or not.” And “woke” is no exception. Born from the spirit of Marcus Garvey and the African American community, a state of being “woke” was a code never intended for mainstream debate. Being “woke” was a reminder to members of the global pan-African community to activate one’s consciousness to forces — visible or intangible, legal or improper, ethical or immoral — that governed inequitable social norms.

In the 1940s, the term “woke” resurfaced as a concept that symbolizes awareness of social issues and movement against injustice, inequality and prejudice. But today, popularity has diluted its meaning and the idea has been cynically applied to everything from soft drinks to period dignity, attracting criticism if too liberally applied. This shift in meaning has forced people to ask the question: Are we living in a “political correctness gone mad” era, where freedom of speech is compromised?

When asked to rate their feelings about political correctness on a scale, research by The Policy Institute found that the British public emerged as most likely of 28 nationalities surveyed to say that people are too easily offended. Only those in Australia and the U.S. felt as strongly that people take offense too readily — although other nations, such as Sweden, Canada and the Netherlands were not far behind. At the other end of the spectrum, people in India, Turkey and China were most likely to feel that people need to change the way they talk to be more sensitive to those from different backgrounds. On balance, most countries tend toward thinking that we need to change the way people talk.

Outside of communication, the same study found on average across the 28 countries surveyed that people perceive the most tension to exist between the higher and lower socioeconomic groups, followed by divisions by politics, social class and immigration, and between those with different values.

In a world that feels more divided than ever, learning how to communicate sensitively and appropriately has never been more important for brands to remain inclusive. However, the challenge is finding a way to do so without compromising your authentic brand self. What’s interesting is that it’s clear we are at a cultural crossroads. Our survey revealed that indeed, more than three in four (79%) agree that brands should be conscious of the language they use to engage with different communities if we are to progress, but the majority agree that convoluted concepts, or hyper-language, can actually be more divisive. With this in mind, is it time that we strip this back, and go back to basics? We can all agree that it’s positive for society to wake-up to cultural issues. Maybe it’s time we stopped trying to sound smart, and spoke in simple terms, where authenticity can no longer be compromised. However you view the term, being alert with your eyes wide open to what’s constantly going on outside of your four walls is the only way to remain in touch and avoid a backlash regardless of the “woke” factor you are dealing with.

Expert Opinion

KAI D. WRIGHT
AUTHOR AND COLUMBIA UNIVERSITY LECTURER

When it comes to dismantling the language around concepts like “woke,” people want brands to be sensitive to cultural shifts.

61%

Of consumers believe it’s most important for brands to be authentic and empathetic (70%).

81%

Of consumers feel they are compromising their true selves to be politically correct. DON’T FAKE IT UNTIL YOU MAKE IT.
As a result of this wake conflict, there has been a blurring of the lines across various aspects of society, leaving many feeling divided as these new areas of growth or change are perceived as infringing on others’ beliefs. From fluid gender identities, and traditional and religious beliefs making a comeback, to reproductive rights reversal, personal ideologies are being fought for in both immediate and long-term futures.

One thing’s for sure, how businesses and organizations navigate and act in these quickly changing landscapes needs to be respectful. They need to consider the myriad perspectives and communities that fill out the cultural canvas around us — or else risk wading into murky waters where even actions taken with the best intent can be criticized and deemed one-sided and overly targeted to the “woke,” or overly manufactured and not authentic or impactful enough.

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With new identities and perspectives come a new set of expectations, and with these come new opportunities to impact the culture around businesses and organizations in positive, productive and empathetic ways. Kai D. Wright, author, academic and Columbia University lecturer adds that in order for brands to impact culture, they have to be intentional. This means proactively identifying points of friction, then evaluating and evolving systemic issues within your organization.

The era of ‘brand storytelling’ is over.

More than half (53%) think brands should release fewer upgrades/new products over the next year. A significant portion (46%) say that new launches make them more likely to buy things they don’t really need. This rises to 56% for Gen Z. 55% believe certain products and product categories have reached their peak in terms of upgrades, with smartphones and other technologies most often noted.

We’re seeing that, in fact, brands can win more in this space by helping people view adversity through a new, positive lens. Adversity is a powerful force that can build character that often evolves into strength and the power to overcome personal barriers. Celebrating this via a lens that spotlights positivity can help nurture the resilient spirit needed to succeed.

HOW TO BALANCE ECONOMIC EMPATHY

The challenges of trying to fight the good fight are compounded by our recent global economic struggles. The outlook has been deemed grim, with experts predicting a decade of stagnant global growth. Currently, geopolitical realignments are ongoing and conflicts on the horizon are all resulting in bleak forecasts, with anticipation of an era of deglobalisation causing supply issues for core components of an economy, such as gas, oil, wheat, semiconductors and people’s safety, among others.

In challenging times we come together. As the UN secretary-general says: “It takes a world to fix the world.” For communicators, inaction simply is not an option.

Consumers are people first — communicators need to stop talking and hijacking conversations and start listening to help move people’s needs to the top of the agenda.

This will have an enormous and long-term effect on culture, consumerism and how the general public views money — a foundational aspect of our society and the system that governs us.

While civil unrest will be much more likely, there is also the possibility that with a bleak economic environment, other issues may drop in the context of people having to choose between heating and eating in trying times. There is a clear divide between personal needs and emotional wants for society, with no one clear answer to bridge all divides.

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And action is critical for brands too. It’s not just about how we target, talk and sell to consumers anymore. Our consumers are real people, who are sitting on a vulnerability scale, lost and in need of support. They require active solutions that contribute to their everyday lives, not endless and costly product upgrades and empty campaign that have no impact.

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To better understand the cultural crossroads facing business sectors and their communities, we need to look at the core areas in which those brands and businesses operate.

However, while all issues are relevant to Gen D across a variety of situations and topics, these are not isolated to just the genres we lay out next. It is more that these are pertinent drivers for the changing face of these sectors, which must be truly understood in order to play a role of enablement and support through this change.

REASONS WHY CULTURE X ISSUES CROSSROADS

Brands, businesses and communities can find themselves aligned by shifting in partnership from the current fear zone to the growth zone.

Communicators can assist this by ensuring they are pressure testing themselves with outside perspectives that ensure campaigns are not built only in the comfort zone.

COMFORT ZONE
- Feel safe and in control
- Lack self-confidence
- Find excuses
- Affected by others' opinions

FEAR ZONE
- Deal with challenges and problems
- Acquire new skills
- Extend the comfort zone
- Realize aspirations

LEARNING ZONE
- Extend the comfort zone
- Acquire new skills
- Deal with challenges and problems
- Set new goals

GROWTH ZONE
- Live dreams
- Find purpose
- Acquire new skills
- Extend the comfort zone
**The Changing Faces of Sports**

Inclusion in sports and what it means for teams and sponsors is a prevalent topic causing rifts as a younger generation tackles new rules and contentious areas for understanding. Whether it’s trans inclusion, spotlighting women, reviewing outdated rules, or the distinction between sex and gender, the industry is struggling to get ahead of what top priorities should be. With the reach and profile of women’s sport has grown over the last few years, and our research confirms that the general public want to see more movement in this space: 60% think it will be important to have more female leaders in sports teams/sponsors/brand partnerships.

**Create the Demand, Don’t Wait for It**

Women’s sports is the right investment — the reach and profile of women’s sport has grown over the last few years, and our research confirms that the general public want to see more movement in this space: 60% think it will be important to have more female leaders in sports teams/sponsors/brand partnerships, and 64% think having more female athletes in games is important. But while women’s sports has grown in the right way, it’s still disproportionate to investment in pathways and marketing that should be blazing the trail for the next generation. From a business investment perspective, the ROI is staggeringly high, and yet many brands for whom both men and women are key audiences still choose to only sponsor men’s sports. As brands who champion equality, how can this situation be evolved? Can we stop focusing on following demand and lead the way, it’s still disproportionate to investment in pathways and marketing that should be blazing the trail for the next generation.

**Trends to Transgender**

Transgender athletes in sport — nowhere is the distinction between sex and gender more nuanced than in the context of competitive sport. Our research found that 30% think it will be important to have more mixed team sports. Could this be the first step for brands who champion inclusivity? Brands need to stop talking about binary categories with such finality and look at how they can create new spaces and kinship together, finding the balance for consumers who are divided between inclusivity and assurance of fairness within competition.

**Authentic Insights Global Report 2022**

**NI in Collegiate Athletics**

In the U.S., the NCAA recently updated its rules to allow collegiate athletes to make money by selling rights to their name, image and likeness, ushering in a new era of opportunity for amateur athletes.

On one hand, the shift addressed longstanding inequity in the distribution of wealth created by predominantly black student athletes to a multibillion-dollar collegiate sports enterprise. On the other hand, the new rules threaten to create new inequities for athletes across race, gender and sport. Can brands win by wading into this new era? To support next-gen youth, how can brands play a role in structural changes applied to the sports ecosystem, which itself tends to be highly inequitable, exclusive and disproportionately racialized?

**Wellness Winning in Youth**

Globally, grassroots sports offers so much more than just the sport being played. There are tremendous mental and physical health benefits. However, the importance of grassroots sports has been marginalized. Three-quarters (75%) agree that participatory mental health initiatives could be prioritized over earning, and more than 1 in 3 (33%) believe youth and grassroots sports should own elite competitive categorizations. Do brands need to refrain from what “winning” actually means against a new climate where health and mental well-being comes first?
The healthcare demands of people around the world are changing at a rapid pace. As people and the planet face new challenges, their priorities shift and so too do their expectations of healthcare companies to find solutions to their emerging health challenges.

Today, offering effective solutions to healthcare problems is no longer enough. People want to be able to make more sustainable choices and they want the provision of healthcare products and services to be more inclusive. However, these elements come at a cost. Most people are unable to afford access to the latest advancements in medical care, further expanding the health equity gap.

Inclusive Language vs. Traditional Labeling

This is particularly relevant when it comes to gendered healthcare brands targeted toward women. For example, there’s a lot of pressure on period/intimate hygiene brands to be more inclusive with their language. However, brands that adopt inclusive labeling, such as “for people who bleed,” have faced backlash from customers for being “woke” or “marginalizing women.” Clinical trials are also evolving to become more inclusive of the dimensions of global society including gender, race and other factors.

The cost of shifting toward more sustainable business practices is having a direct impact on the affordability, and sometimes efficacy, of everyday health and personal care products. And while there are an increasing number of organizations taking bold steps to be more diverse in their internal and external actions, their efforts are being met with a mixed response of support and criticism.

Businesses in the healthcare space are struggling with communicating on multiple issues, varying from abortion to trans inclusion as matters of health and equity. Employees of healthcare companies see their leaders leaning in hard on health equity topics but failing to confront these real-world issues.

No one company can be everything to everyone. So how do healthcare organizations balance the need to deliver safe and effective products while answering the growing demands of their consumers? And how do they do this while prioritizing and focusing their efforts on changes that are most authentic for their business?

44% think gender-based coloring on products and packaging should be removed.

find the use of language around gender identity in healthcare confusing. Brands and businesses need to consider the obvious and vital areas where archaic binary categories can disappear, while at the same time not rushing into judgments for the sake of change.

would buy a gender-neutral product — and only 10% say they wouldn’t (the rest are neutral). Brands should consider mixed category products to be used by men and women in the same way.
Ethical Practice vs. Efficacy of Products
It’s clear that there is a growing expectation for health and wellness companies to produce products with clean, simple, and sustainable ingredients, without compromising on efficacy. Seventy-three percent of consumers believe climate change is a major concern with regard to their impact on healthcare for future generations. Today, healthcare brands must try and find a way to meet altruistic needs while still delivering on traditional product benefits.

71% of consumers believe that it is important to talk about the ‘unglamorous’ parts of health. We’re seeing lots more open discussions in this space — is there a role for healthcare brands to bring under-discussed topics to the forefront?

62% of consumers are not confident with what ‘digital healthcare’ means. Are there ways for healthcare organizations to simplify this so that consumers won’t feel left behind? This continues to corroborate the role that healthcare brands and businesses need to play in being educators of the access and usability of modern, digital healthcare (45% want investment in health literacy).

Know When To Be Quiet or Vocal
As expected, we’re seeing that consumers will turn to healthcare professionals (69%) or family and friends (58%) first when it comes to health-related information over brand websites (39%). This indicates that brands or organizations in this sector should look to create open spaces that provide an open forum for comfortable discussion vs. taking the role of health professionals themselves.

Accessible Healthcare
The rise in digitalization of healthcare and at-home diagnostics, even the reclassification of the contraceptive pill as a healthcare innovation that has helped to improve consumer access to healthcare. However, these benefits come at a cost. While some argue healthcare is becoming more accessible, there are concerns about health equity and the disparity between the wellness and health literacy of the wealthiest versus poorest members of society. This is particularly sensitive against the backdrop of the cost-of-living crisis, which our research confirms is the biggest concern to the public (87%). If healthcare brands can find ways to manage and improve access without excluding certain communities altogether, they can help unite versus divide consumers in this space. Interestingly, our data also showed that a small proportion of people (14%) would go to a hospital in the metaverse. Could this be a future-facing solution to explore for helping reduce costs?

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Accelerated digital innovation has put world-shifting technologies on a collision course with each other. There is a race to re-invent everything, providing huge opportunities and unknowns for the future of brands and people — potentially shaping the next generation of digital society for all ages. Web3 has begun to shift control, access and ownership of the media through decentralization to redefine the internet, but is the world ready for Web3 or are we headed for a diluted Web2.5?

Web3: a dilution of Web2.0?

Online Recycling

There is a lack of understanding among the general public about the implications of the environmental impact of NFTs and Meta. This has some observers asking if Web3 is already here. Is it less of an environmental risk that many didn’t know existed in the first place? How can brands follow this example to seamlessly incorporate the real-life environmental impacts of their online activities. In recent months, the Ethereum blockchain has transitioned to a new proof of stake validation system that has cut its energy consumption by approximately 98%, making it less of an environmental risk that many didn’t know existed in the first place. How can brands follow this example to seamlessly incorporate the real-life environmental impacts of their online activities?

Interoperability

One of the largest barriers to the establishment of a metaverse is the lack of interoperability, and this has many companies, consumers and brands concerned. Seventy-four percent agree that brands should collaborate to create more innovative and efficient products and services and eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos. Brands should ask themselves, how and who can they authentically co-collaborate with to not only create more innovative and efficient products and services but also eliminate silos.

NFTs 

Are NFTs as controversial as they are impactful? Whether it be their environmental impact or market volatility or security concerns, the hype has died down, the true potential of a tokenized economy and smart contracts have the potential to redefine ownership, trade and access, but can the technology overcome its current significant hurdles to achieve its true impact? While there will still undoubtedly around the metaverse, we’ll look like us in its final form, the technology driving it has helped disrupt the way we work, watch, shop, game, earn, meet, date and even get married.

The term of Meta is shifting. TikTok is not just surpassing other social platforms in terms of global internet traffic, but is also being accessed to the level of Google and its suite of tools. With its new Deepfake Maps and Gimbal TikTok might be reinvigorating entertainment, giving the next generation of activists new ways to tell stories and challenging the global internet order. One of the key reasons behind this authenticity. The youth are tired of high production, over-contrived content that is more of a one-way broadcast than entertainment. They want social media to connect, be entertained and showcase who they really are — while also connecting with friends. Authenticity is a big reason for this new look on the social block BeReal and the fall in affection for Instagram. BeReal is social media with a focus on authenticity. — where you post unfiltered what you are up to at the time. It is a whole new world — authenticity and a stronger connection with friends. — what does this mean for overly curated brand content and corporate concerns?

What are the implications for the visions of the future, what is the role for us from a true metaversal experience? While the answers, brands and businesses need to start thinking about how to harness this emerging technology to shape an ecosystem of opportunity.

With advancing innovations, the potential to shape an ecosystem of opportunity is enormous. What do we know is already here. The term of Meta is shifting. TikTok is not just surpassing other social platforms in terms of global internet traffic, but is also being accessed to the level of Google and its suite of tools. With its new Deepfake Maps and Gimbal TikTok might be reinvigorating entertainment, giving the next generation of activists new ways to tell stories and challenging the global internet order. One of the key reasons behind this authenticity. The youth are tired of high production, over-contrived content that is more of a one-way broadcast than entertainment. They want social media to connect, be entertained and showcase who they really are — while also connecting with friends. Authenticity is a big reason for this new look on the social block BeReal and the fall in affection for Instagram. BeReal is social media with a focus on authenticity. — where you post unfiltered what you are up to at the time. It is a whole new world — authenticity and a stronger connection with friends. — what does this mean for overly curated brand content and corporate concerns?

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Generation Dividends has moved to our dinner plates. The pandemic reset what we choose to eat — both in the cuisine and the ingredients. After decades where an increasingly global supply chain and technology helped us not just learn about different cuisines, but source the ingredients and tools to make them, the necessity of cooking at home was accompanied by more time to cook and passion for gardening and food preservation, alongside the sharing of recipes. Yet empty shelves (or more appropriately, the inability to order online) reminded us of our dependence on a fully functioning supply chain and the impact our choices have on our environment and farming families.

And this spring, the impact of international conflict on the global food supply began impacting not just food availability, but also food costs. So where will we settle? Will our desire for variety and low-cost, readily available foods drive us back to our “super global” or will our desire to be more self-sufficient and make choices both good for us and good for the planet advance us further down a “super local” path?

The food, beverage and retail sectors find themselves at multiple crossroads. There’s a future need for labeling to highlight how far a brand is from farming. The shifting relationship between cost and quality — including what defines “cost,” what defines “quality” and can a cost be “too low” to deliver quality food? The balancing act happening globally around provenance and sustainability in our diets.

Local Ingredients, Global Palate
The food availability vs. costs debate is high on the agenda for food brands and consumers, and both inevitably impact our environmental footprint. Our research confirms that three-quarters of consumers say using local resources to reduce the environmental impact of food is very/extremely important (74%). With such high figures, brands should learn and lean more into the benefits of going super local. Going super local doesn’t mean a lack of adventure. Our research shows consumers are embracing global cuisines and exploring new types of food, with 59% saying it is very/extremely important to them.

The rise of country-to-country conflict and its impact on food security/uninterrupted supply, and food equity remains an issue with income and location affecting access to, and education about, healthy foods. The fresh/frozen shifts, change in ready-made food purchases, views on what “healthy” looks like in a diet culture backlash and “good for me, good for the planet” culture are taking a front seat. The balance between having nutritious foods in our body with regards to wellness comes at a price. Meanwhile, the change in the size of the online basket has shifted consumption, and the striving for perfect foods, the role of technology in delivering the right types and the amounts of food are all critical considerations for governments, brands, people and businesses.

How do brands and businesses show the potential benefits of technology alongside the benefits on nature?
Overall, just over half (51%) of consumers feel loyal to a specific political party, while the other half don’t (49%), showing a clear division among consumers for the visibility of political affiliations today. With the abundance of platforms and spaces where people now gather around issues, knowing what people care about should be clearer than ever. Yet with all this noise, it still seems as if no one is being seen and genuinely understood from across the chasm of the political divide.

It’s not just a lack of communication between political oppositions, people are struggling to find a clear line of communication into the political parties they support, and therefore don’t see themselves reflected in those political parties. Major influential powers continue to enter office without getting the general public’s explicit approval, and there continues to be an age-old disconnect between the young and the old, who are typically in power.

45%

Support companies that share certain values, which is considered to be an important as campaigning or protesting (36%).

When it comes to driving positive social change

When it comes to driving positive social change (35%),

58%

Our research supports this, with half of respondents saying that the COVID-19 outbreak made them more aware of, and concerned about, other cultures, and that sometimes the best things for bringing us together can come from outside perspectives.

35%

Overall, see themselves and their values reflected in mainstream political parties, but 58% don’t see themselves reflected in their political leaders.

Cultural Support

We are learning to prioritize the issues that matter to us over the flags or faces that make up our political parties.

56%

Voters, particularly young ones, are far more concerned about issues than party loyalty. It’s not about right or left, it’s about making the right decisions for society and future generations. The divides, differences in opinion and long-standing tensions between key trading countries has the potential to be a landmark issue for this generation with ripple effects on economies, supply chains and trade partners. However, campaigning on issues is much more doable and less problematic for brands.

42%

As consumers united in their desire for more simple, digestible communication around politics (71%), is a ripe space for brands to become category and opinion leaders and influence real societal change.

WILLIAM DSPORT

IDENTITY POLITICS

58% of consumers feel that political beliefs are not easy to influence the choice of political party.

29%

While on the other hand 29% feel that political beliefs are not easy to influence the choice of political party.

16% and 20% feel that the choice of political party is either easy or not easy to influence the choice of political party.

56% of consumers feel that political beliefs are not easy to influence the choice of political party.

55%

Personal Loyalty Over Party Loyalty

This is an opportunity for large brand loyalty around key issues, but one that is still somewhat and in need of ingressive working.

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The way that employees experience the workplace has fundamentally shifted along with their expectations of what they want from it, and we are still seeing the presence of cultural and generational divisions. Organizations today have rules in the form of contracts, policies and practices, hierarchies in the form of structures, leaders and roles, and norms in the form of culture, values, and behaviors; and we are seeing all three of these elements being blown up on a regular basis as the employer-employee dynamics shift.

The big issue that no organization can truly deny is that time is people's most precious commodity, and the death of the commute has given desk workers that time back.

We're in the midst of extraordinary times in the relationship between employers and employees. Employers seem to be finding themselves on the backfoot of nearly every challenge, and employees are consistently turning up the heat. Around the world, we're seeing unions making a comeback, with empowered workers demanding better wages, benefits and treatment. To many, this certainly has been good news. However, there is a growing divide between salaried supervisors and their hourly union team members, and we are seeing this globally.

As these cultural differences collide in the workplace, tensions are undoubtedly flaring on many fronts and it's unclear how this will shape up. Will the entry into recession and the tightening of the job market work in favor of employers or will we continue to see increased division in the workplace?

Are companies that have actively been supporting, not just promoting, DE&I better prepared for this? What are their characteristics? At times of division, what are the universal truths that people can hang on to, such as mutual respect or care and compassion? Are we going to see changes in the typical CEO traits on a CV?

Societal Issues — Employers As Mediators

Societal issues around the world have entered workplaces and employers have found themselves operating as mediators, spokespeople and, to a certain extent, agents of employees whose voices have never been louder on these topics.

With increasing transparency about what happens inside an organization, and employees' willingness to be activists to drive their position, employers' reputations are at stake, and the positions they take can have consequences. Organizations should purposely take a stance because employees are more assertive in their position that they won't work with companies that don't take a stance on issues they care about.
The ‘Say-Do’ Gap: Have Employers Earned the Right to Speak Out?

Increasingly, employees are more vocal about what they want from an employer and are willing to speak out about it or go and work elsewhere. Alarmingly, 54% agree that employers often fake their interest in DE&I and other societal issues, which demonstrates a real need for organizations to make time to prove their commitment to these issues. It’s clear that employees want their beliefs to be matched by their employers, including purpose and brand values, but have they earned the right to speak and act on issues externally?

53%

Say providing good benefits to staff is most likely to make employees feel proud to work for their employer. This is slightly ahead of helping staff feel like they are making a difference (49%).

58%

Say being able to play a role in shaping the future through professional life and through personal life (66%) are equally important. How can employers help employees feel like they are working towards a better future via the work they do?

63%

58% of people would choose an employer based on its willingness to take a stand on societal issues.

Community Over Cities, Consumerism and the Commute

Generally, people have picked up more sustainable habits since working from home, and all of a sudden the rat race is being rewilded to our new vision for our future. With this in mind, how can employers tap into their staff’s new preferences? Employee benefits can be reinvented with this new mentality in mind, with benefits for home-life and work-life blurring.

Hourly workers are experiencing record-breaking profit sharing every quarter compared with a meager annual incentive bonus the supervisors get. Meanwhile, the hourly workers clock out at the end of the day while these supervisors get called in at all hours of the night when things break down at work.

46%

Say opportunities for people to widen their knowledge is more of a driver to be ambitious than money (44%). Power is the lowest ranked driver of ambition at 18%.

52%

46% of people either currently have a side hustle or are planning to start one. 61% are more likely to use up leftover food. 64% are more likely to repair existing products over buying new ones. 52% are more likely to wear clothes on repeat.
We’ve dived into sector analysis and looked at how divides have manifested, but our findings also demonstrate that this current context has indeed affected the purchasing model. What our findings show is that consumers today are facing a more complex decision-making process when it comes to purchasing goods and services. Not only that, but they are in a state of making (sometimes) stressful, paradoxical purchasing decisions as they try and take control of what their impulse desires versus what they think they need and what they actually do. This is heightened against a backdrop of financial viability and future morality.

This significant shift means that comms leaders must pivot quickly away from talking about product benefits and instead look at how they can enable communities. In doing this, comms leaders can demonstrate that they have factored in a more holistic view that takes into account the new moral journey when purchasing. Just as Kai D. Wright noted earlier in the report, culture is dynamic, ever-evolving and never static; it affects every aspect of a customer’s experience; if brands don’t adapt, not only will they be left behind, they’ll be left vulnerable.

As consumers embrace the complexity of purchasing, we will see this continue to evolve to be a bolder state of mind and habits as people cement their beliefs and stick to routines that benefit more than just themselves.
CAMPAIGN EFFECTIVELY WITH YOUR AUDIENCES

Hear from acclaimed author and Columbia University lecturer, Kai D. Wright, and our approach for communicators to build highly effective campaigns that resonate and inspire action.

The generation of today analyzes the world through a lens of authenticity and moral judgment. From relationships to purchasing decisions, the key takeaway for brands and organizations is that in order to thrive in the coming years and beyond, they must evolve into their authentic selves.

This means moving away from neutrality and outdated ethics, heritage even, and into a state of ethical alertness and proactivity.
Our partner and contributing author and lecturer at Columbia University, Kai D. Wright, proposes that in order to remain comfortable in a state of ethical alertness, we must be “intentional” in our decision-making. This is so that we can proactively identify points of friction, evaluate conditions, and evolve systemic issues within our organizations.

While there is no one-size-fits-all formula for the above, there are ways to mitigate risks, to help brands and organizations remain on the front foot.

Brands need to develop a relationship with Gen D, which should always start with cultural understanding. Why? Put simply, culture is a byproduct of communities. And with the proliferation of technology, social media, and globalization, the idea of community has expanded to include lots of shared traits, from geography to identity. Understanding these nuances paints a clearer picture of who Gen D really is, and how they really feel.

We can challenge demographic-based messaging and tactics that lack timely cultural relevance by rephrasing “target audience” language and labels to “communities.” Although a seemingly subtle shift, framing a communication, brand or business goals in the context of group dynamics broadens the range of activations, authentically attracts brand attention, and efficiently empowers necessary nuance.

We’ve illustrated that Gen D has their fingers on the pulse of authenticity and can easily sense whether a brand is looking to make a difference or just line their pockets with a guise. Brands and organizations must put themselves in the shoes of their consumers and the culture they want to champion in order to make a meaningful impact. Ultimately, enacting bold and brave actions has impact when brands listen, probe and address societal issues that might not always align with the brand or organization. When companies can have a voice and make a difference when it matters, communities are more likely to become brand advocates — that can often strike fear of the unknown into leaders.

Ultimately, neutrality can no longer be an option; consumers don’t accept empty statements. It is more important than ever for brands to be brave and have conviction in their stance.

Brands and business leaders face an increased risk of “cancel culture” if they fail to understand and engage with communities in a manner that’s rooted in and respectful of diverse cultures.

If brands and businesses are too focused on generational segmenting (i.e. age-based cohorts), then they miss the biggest ‘aha’ about culture: new communities are forming daily so brands cannot stand still in the speedway of culture by planting stakes around age-based beliefs.

KAI D. WRIGHT
AUTHOR AND COLUMBIA UNIVERSITY LECTURER

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For brands to navigate, brand leaders need to audit recycled communications to align with timeliness (i.e., current cultural sentiment) and appropriateness (i.e., cultural sensitivity), to best move through the changing societal issues in a timely manner. This is particularly important as culture is dynamic, ever-evolving and never static. Just as the meaning of terminology shifts within society over time, so should brands.

In an increasing world of viral sensations, economic headwinds and political change, infrequently revising brand assets and guidelines create significant brand risk as sentiment and social norms change. Understand, and act to make communities better off in a manner rooted in and respectful of diverse cultures.

Always adopt a more holistic approach to evaluating brand assets and guidelines, communication and campaigns for cultural sensitivities by sense-checking against the below categories:

LEXICON
Evaluating both what is said and how it is said to ensure relevant nuance for community appeal through language, voices and imagery.

EXPERIENCE
Creating community-oriented rituals, habits and customs that celebrate and recognize cultures through methods like immersion or conversation.

CULTURAL CONNECTIONS
Ensuring ethical guardrails for strategy, execution and impact by solving three critical areas upfront.

(1) How does this make people better off? (Empowerment)

(2) Does this address or solve an issue the community has prioritized or asked for? (Earnestness)

(3) Does this include voices, creators, media platforms from the community? (Empathy)

Adapted from Follow the Feeling: Brand Building in a Noisy World by Kai D. Wright (Wiley, 2019).

Expert Opinion

KAI D. WRIGHT
AUTHOR AND COLUMBIA UNIVERSITY LECTURER

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A flexible planning approach for a divided world.

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After spending the time to establish and cement your presence and role in the first two acts of your journey, we can help you take the learnings from this year’s insights report to help provide a gateway to your third act.

Moving into your third act often means evolving your approach to make a difference; and this might require a readjustment, a realignment or maybe even a reinvention. Our global group of counselors with lived experience and professional expertise is on hand to help you authentically evolve your positioning by offering a fresh perspective, timely counsel and deeper audience understanding. This ultimately helps create lasting change — for our clients, their people, their audiences and communities worldwide.

Our taster workshops explore the drivers fueling a growing cultural divide between communities and can help you address the challenges and questions in your audience segment, ultimately to dissect where you can win.

- What drives loyalty?
- What is alienating new customers?
- Are there intergenerational divides that need common ground?
- Are you willing to embrace new audiences outside your typical segmentation?
- How do you make your audiences feel like a united community?
- What can you implement to learn from your changing customer habits?
- What are they looking for as individuals?
- How can we speak to them authentically?
- How can we empower their side hustles?
- How has learning and developing changed?
- What is holding the community back?
- What would propel the community without gain?
- Voting / religious / gender / other?
- Is sustainability “safer” than DE&I for you? Can you meet both needs?
- What does DE&I look like when the organization is more conservative in their values?
- Are you prioritizing the health of the planet alongside the health of your employees?
- Do you commit consistently to authentic changes within your organization?
- Can you put a price on impactful change?
- Are there some issues you think you need to sit on the fence more with?
- What are the issues where you believe you can have a strong viewpoint on without isolating your wider organization?
A NOTE FROM THE EDITORS

Through this study and report, we hope to inspire and support leaders to not only authentically evolve, but to commit tangibly to change, regardless of where they are in the journey of having a greater positive societal impact.

This report’s collective workshop questions, best practices, and tips provide a holistic approach to meeting the expectations of a Generation Divided, while remaining hopeful that today’s societal issues will become yesterday’s news.

Lauran Winter
EDITOR
Global MD of Consumer Culture

Kai D. Wright
PARTNER
Author and Columbia University Lecturer
A global team of macro culture strategists that enable brands to be brave and take action, while being thoughtful of the cause they are communicating.

CURATED BY
THE CULTURE UNIT @ FH

RESEARCH CONDUCTED BY
TRUE GLOBAL INTELLIGENCE

Data fueled by FleishmanHillard TRUE Global Intelligence from September 15-20, 2022, gathering insights from 5,000 consumers across the U.S., UK, Brazil, Germany and China.