

A large, circular, semi-transparent blue overlay covers the center of the image. Inside this circle, a diverse group of young people of various ethnicities and ages are smiling and looking towards the right. The background of the entire image is a soft-focus photograph of a similar group of people smiling outdoors.

Navigating 2024: What you need to know

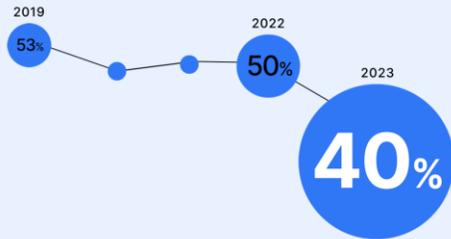
A perspective on the year to come in
communications from Edelman Strategy

At Edelman, we study the themes and issues shaping our world closely

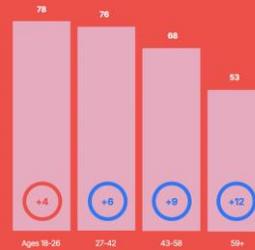
Through IP and research that discovers what makes people trust

Economic optimism collapses

People now fear for their economic future without a trust safety net. Only 40% of respondents say they and their families will be better off in five years, a 10-point decline from 2022.



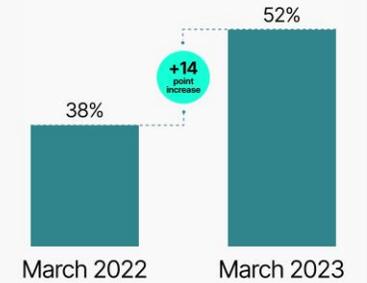
Teenagers and college-aged people influence where and how I shop



* Blue circle indicates a statistically significant change yoy

Good health feels further out of reach

There is a meaningful gap between how well I am taking care of my health and how well I should be.



By advising the world's largest businesses how they can

Anticipate

big shifts in consumer behaviour

Act

to embrace new opportunities

Avoid

risks that will impact Trust

This is the third year we've tracked mega-trends in communications

2022

The Road Back to Hope

The role for business in rebuilding hope as we build back from COVID-19.

2023

The Search for Stability

How brands and business can help people find stability in an age of constant disruption.

2024

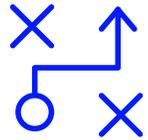
Reasons to Look Forward

It's time for brands and business to help people find the optimism they need to move forward.



OUR VIEW ON 2024

Reasons to Look Forward



People are tired of worrying and tired of being confused about their future.



They're looking to the brands & businesses they trust for reasons to be optimistic



Because to move forward people need to believe that things can get better

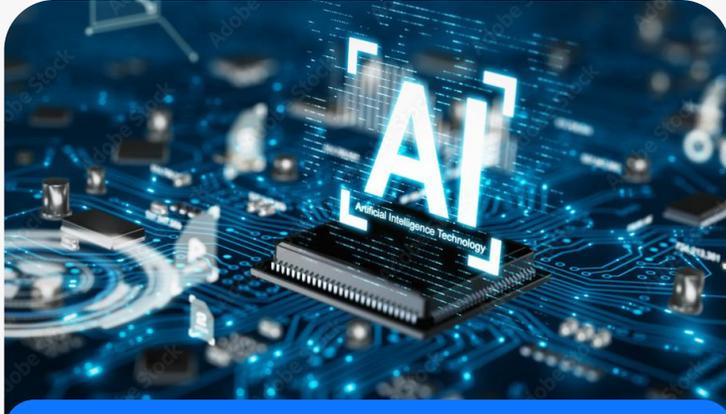
**A new role for
business in 2024**

Win Trust with:

Actions that help people envision a more optimistic future

Communications that make space for fun and hope

Three Macro Trends for Communications



Flipping the narrative

Three areas where a new take on old narratives can help business start having positive conversations with stakeholders on important, but divisive societal issues.



New values to navigate

People's values are shifting. Here's how brands and business can navigate this to differentiate itself and grow Trust with key stakeholder groups.



New rules for earning engagement

How people consume media never stands still. There are three new rules for ensuring brand and business communications grab - and keep - people's attention in 2024.



Flipping the narrative

Stories matter.

The narratives surrounding big issues such as Artificial Intelligence will define whether people feel afraid of or excited by them.

In 2024, business can cut through three polarized narratives around climate, technology and health with **actions that drive trust.**

ANNALS OF ARTIFICIAL INTELLIGENCE

CAN WE STOP RUNAWAY A.I.?

Technologists warn about the dangers of the so-called singularity. But can anything actually be done to prevent it?

Bringing possibility to the AI-pocalypse

AI offers riches for the few and existential threat for the many. To build Trust, business can share a vision for AI that has a happy ending for more than just their bottom line.

Patriotism could be the unlikely answer to solving the climate crisis
Anatol Lieven



Sustainability becomes nationalism

Countries are competing to be cleaner as sustainability moves closer to patriotism. But when **65% of people*** think business isn't living up to its climate promises, how can it show what it contributes where people live.

33% Of Gen Zers Trust TikTok More Than Doctors, New Survey Shows

My health, my responsibility

At a time when **67%**** of people expect to have an active voice in their healthcare, the brands and business that prosper will take the opportunity to empower people to take care of their health.

* Edelman Trust and Climate 2023

* Edelman Trust in Health 2023

Bringing possibility to the AI-pocalypse

2023 was the year when AI broke into public consciousness as science fiction made real.

2024 will be the year where business must show that the story can have a happy ending. Businesses that make reducing costs or workforce the core of their vision for AI will be swept up in skepticism and even hostility.

The businesses who build trust in their use of AI will harness it to right-size its usefulness and mitigate its risks.

A chance to shape good policy

EU 'in touching distance' of world's first laws regulating artificial intelligence

Dragos Tudorache, MEP who has spent four years drafting AI legislation, is optimistic final text can be agreed by Wednesday



Italy's decision ban some LLMs anticipated a wave of government action to regulate AI. The European Union announced an EU AI Act in the summer, followed by a sweeping Executive Order from the US President and an AI Safety Summit in the UK which resulted in a joint declaration between the UK, EU, US and China. This is an opportunity for business to shape policy positively by setting out clearly how they will use the technology while advocating for effective legislation.

Make creators an ally not the enemy

The Only Sure Thing with AI Is Writing Will Get Blander and the Rich Will Get Richer

AI programs aren't about to replace novelists. But that doesn't mean they won't damage writers.

Disney's efforts to own day players' images in perpetuity, or writing tools that flood Amazon with unreadable books have earned the vocal distrust of creatives.

Business can change this by engaging the creative community to show how AI has the possibility to enrich their practice.

Make it useful, not frightening

TECHNOLOGY

Nearly half of voters fear AI will take their jobs

Public report concerns about impact of artificial intelligence on redundancies as effects already felt in some sectors

Focusing on AI's more exciting use cases has created buzz at the expense of trust – especially when many products are not quite ready for primetime.

Business can gain the trust of their employees in particular by experimenting with AI that augments rather than replaces their workers..

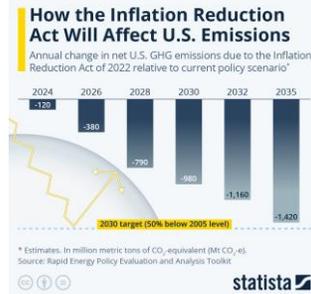
Sustainability becomes nationalism

The lofty global climate goals of the 2010s are out. Patriotic narratives where countries increasingly compete to fix the problems caused by climate change are in.

This is a huge opportunity for governments to turn the pride people take in national biodiversity, clean water or fast rail networks into support for sustainability projects. It will require global business to communicate its actions differently.

Building trust in 2024 means stepping way from global commitments to double down what businesses are doing in the places where they operate.

Stoke healthy competition not division



The Inflation Reduction Act reminded the world what the US can achieve when it puts polarisation aside. It succeeded by presenting a raft of infrastructure measures to improve sustainability as a way of keeping the US competitive against China.

Give people something to feel proud of

Swimming in the Seine: You'll soon be able to go riverbathing on a visit to Paris



Countries' efforts to lead EV manufacturing or be the world's most sustainable travel destination feed stirring, narratives that give people hopes and shared endeavour around climate change. The businesses that build trust in 2024 will play into this more nationalist vision of sustainability.

Communicate contribution over purpose

Sweden Poised to Miss the Long-Term Climate Target It Pioneered

- Center-right government cites tough economy, weaker krona
- Sweden was the first nation to set a milestone net zero goal

In a year when many global businesses will miss ambitious climate targets they have a chance to rebuild trust. Instead of focusing on carbon or water saved, they can build trust by showing the contribution they've made to the social and natural environments of the places where they operate.

My health, my responsibility

Wellness, COVID-19 and struggling healthcare systems mean that people are taking greater responsibility over their own health. Edelman research shows that **41% of people are actively educating themselves about it***.

However, increasingly polarised narratives around medical science and healthcare mean many people no longer trust the experts enough to follow their advice.

The brands and businesses that build trust in 2024 will overcome this by empowering people to feel that good decisions for their health are their decisions.

Is it self-care or self-determination?

“Health does not begin in a hospital or clinic. It begins in our homes and communities, with the food we eat and the water we drink, the air we breathe, in our schools and our workplaces.”

Dr. Tedros Adhanom
Ghebreyesus, WHO
Director General

Self-care is an essential part of ensuring access to healthcare in a world where demand outstrips funding. To find genuine support for this, business and government may need to change how they tell this story.

Instead of framing it as affordability, they can show how self-care gives people what they really want: the ability to care for their own health.

Facts and feelings matter

For Hospital Patients, Feelings Are Facts

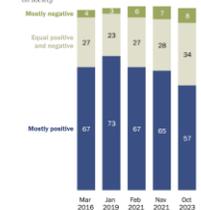
Understanding how patients think they're feeling is crucial to improving perceptions of their hospital stay

Good health today is as much about how someone's feel as what an expert tells them.

Wellbeing companies can grow trust among skeptical audiences by learning to make fact-based claims about their products. Healthcare companies can win people over by showing how a treatment or product makes them feel as well as be better.

Nudge people back to science

Fewer Americans now say science has had a mostly positive effect on society
% of U.S. adults who say science has had a... effect on society



Notes: Respondents were asked how they felt about the overall effect of science on society. Source: Survey of U.S. adults conducted Sept. 29-Oct. 8, 2023. Edelman Trust in Science. ©2023 Edelman Research Center.

According to Edelman's Trust Barometer for Health **37% of 18-34 year olds believe that a person who has done their own research can know as much as a doctor****. At this delicate time for, the health businesses that rebuild trust will avoid the temptation to judge or talk over people who often have good reason not to trust traditional authority. This is a unique opportunity to forge relationships based on mutual respect.

* Edelman Trust in Health 2023

** Edelman Trust in Health 2023



What does flipping the narrative mean for brands & business?

Have a vision for AI that travels beyond shareholders

Businesses that focus their AI vision on job cuts and efficiencies will struggle to get ahead of people's concerns over the technology.

The businesses that grow trust in their use of AI will show how it could transform working life and quality of life for their stakeholders while transforming their operations.

Sustainability is a source of hope – and growth

The pride people take in living somewhere clean and green is a big opportunity for business.

By focusing on the actions they're taking to improve the places where people live, business can overcome the loftiness that's hobbled sustainability. It can finally position green business as a source of growth.

People will buy into health if they feel included in it

Regardless of how much people know about their health, it's theirs and they feel responsible for it.

Health businesses can capitalize on this with communications and actions that empower people to discover what good health means and give them the means to achieve it.



New values to navigate

People's values on everything from who is prime mover in society to the right way to age are changing.

These examples show how brands and business can navigate these shifts in a way that differentiates them and grows Trust with key stakeholder groups.



Power lies in the collective

People have worked out groups get a better deal than individuals. This pushes business to change how it communicates with people – especially workers - who now see collective action against more powerful institutions as key to getting results.



SKIN IS IN
Skin, skin, skin. It was the focus almost everywhere. Interesting—I noticed a rise in skin prep backstage as to ensure a healthy dewy glow accompanied clothes down the runway. Skin will be a huge focus for 2024, so go ahead and book your dermatologist appointment—stat.

The science of beauty and self-image

Science's ability to discreetly tweak our appearance, our weight and the rate we age is changing our idea of beauty and how to attain it. This brings opportunities, but also risks for brands who bought into inclusivity & body positivity.

SUSTAINABILITY

Even Gen Z Is Investing In (Second-Hand) Quiet Luxury Now

BY EMILY CHAN
22 August 2023

New generations flex their spending power

Strong spending on luxury goods and travel in 2023 has challenged the idea that millennials and Gen-Z are eternally cash-strapped. But how can brands ensure they earn the trust and the spending power of younger consumers?



Power lies in the collective

In her speech for the 10th Malala Day, Nobel Prize winner Malala Yousafzai repudiated her idea of “one child, one teacher, one book and one pen can change the world” in favour of a more collective idea of how we make change.

Today, opinion leaders in every sphere from environmentalism to labour relations know that the answer to complex problems lies in collective solutions. **In 2024, the businesses who build trust will be those who take action to bring stakeholders together and deliver change.**

Climate action goes local

71% of people agree the weather where they live has gotten more extreme

Now climate change is everywhere, it's a local matter. Climate groups such as Friends of the Earth are thoroughly embedded into communities. Brands and business can join them in those communities to build deep local relationships that will help make their climate actions more tangible and trustworthy.

Unions win hearts & minds



Strikes by the Writers' Guild of America and the Screen Actors Guild have made the labor movement visible, eloquent and even sexy. Employers that build trust in a resurgent era for organized labor will actively engage with their workers – starting with Gen-Z. Employers who let a dispute reach the external world will struggle to control or win the argument.

All audiences are connected

UAE says it will allow climate activists to assemble 'peacefully' at COP28

The United Arab Emirates said Tuesday it would allow environmental activists to "assemble peacefully" at this year's UN climate talks, despite a prohibition on unauthorised protests in the Gulf state.

COP 28's decision to welcome activists recognises that you can't keep your audiences apart. Taking a multi-stakeholder approach to communications is essential to build trust in 2024. This especially applies in crisis situations such as those currently playing out in the Middle East, where conversations play out on platforms that make no distinction between activist and policy maker.

The science of beauty and self-image

Beauty ideals are changing as developments in science reshape our idea of what's attractive and how to attain it. The high artifice of contoured makeup that defined the 2010s is out in favour of a 'natural look' which is really attained through cosmetic tweakments, pharmaceuticals and a new generation of anti-ageing products.

This is a challenge for beauty and personal care brands who have dominated this sector for the past decade. And an opportunity for companies at the intersection of health, wellness and medical science to sell highly profitable products and services.

New age of anti-ageing



Behind the multiple publicity campaigns from Bryan Johnson, who allegedly spends \$2m a year on looking young, there are billions of investment in science, technology and products designed to push our body clocks back. This may mark a return for the anti-ageing paradigm that brands left behind in order to embrace positive ageing.

Beauty goes all in on tech



The beauty boom of the last decade brought huge swathes of young consumers into serious skincare. Now that brands have their attention they're using developments in science and diagnostics to turn them into lifelong consumers with products and services optimised to move with them as they age. Brands who build trust in this era will be those who use communications to blend the art and science of the new beauty.

The body positivity backlash

IDEAS • HEALTH
Ozempic Exposed the Cracks in the Body Positivity Movement

Ozempic has reshaped Hollywood and now could be reversing the body positivity movement. Brands and business that made commitments to inclusivity may need to hold their nerve in a world where it's fashionable to be skinny again.

New generations flex their spending power

Younger consumers drove strong growth in luxury and travel in a year when many analysts expected a 'richsession' for discretionary spending.

The fact that millennials splurged on handbags and holidays during a cost-of-living crisis is more than a sign that this generation is finally coming into its spending power, however.

The areas where younger consumers are willing to spend and invest their often still-limited funds is a strong sign of what they value – and how brands can earn their trust.

Gen-Z deserves couture



Data from Bain shows **Gen-Z are making their first luxury brand purchases 5 years before millennials did*** Meanwhile Tik Toks explaining the 'girl math' that justifies an expensive handbag have crossed into the mainstream. Younger consumers haven't just bought into luxury values younger – they expect deeper access to these brands than a lipstick or perfume

The White Lotus effect



Millennial and Gen-Z consumers drove travel's bouncebacks to new heights in as they spent up to \$5,000 each on multiple vacations.

Yet where and how they travel is defined more by clout than word of mouth. American Express research shows that **70% of millennials and Gen-Z were inspired to visit somewhere after seeing it on TV or in a film.**

Investing in their health

48% of Millennials and Gen Z'ers are investing for retirement through this account – and no, it's not a 401(k) or IRA

A Charles Schwab report indicates that Millennials and Gen Z'ers are investing in HSA accounts.

At a time when Edelman research shows that **68% of Gen-Z see health and wellness as their most important life goal*****, it's no surprise that they're investing in it for the long-term. Not only are they more proactive in seeking preventive healthcare, but in the US 48% of younger consumers are preparing for health expenses in old age now by investing in Health Savings Accounts.

* Bain Capital – Renaissance in Uncertainty, 2022

** American Express – Global Travel Trends, 2022

*** Edelman Power of Gen-Z, 2021



How can brands & business navigate new values?

Design comms to travel across audiences

Audiences don't stay in their boxes. They interact with and influence each other all the time.

Brands that adopt a multi-stakeholder approach to communications will see their content and messaging travel further and earn audiences' trust.

Stay loyal to the consumers that other brands abandon

As fashion turns away from body and age positivity many consumers who finally felt included by these movements may feel abandoned and angry.

Sticking with these large, vocal and still underserved audiences through this phase is an opportunity to earn their trust and keep their custom.

Find the point where value and 'values' intersect for younger consumers

Changes in spending habits up-end many long-held ideas about how to market premium goods, services and financial services.

Brands and businesses that move quickly to identify where their products and services intersect with younger consumers' values will find trust and growth.

New rules for earning engagement

Three years on from a year where everyone spent far, far too long online, people are making conscious choices to reset their relationship with the news, social media and what they do with their time.

In this environment the tone, frame, channel mix and even purpose of brand communications may need to shift.

Sharp decline in appetite for news in recent years, Reuters Institute says

© 14 June · Comments

The rise of the choiceful consumer

25 years into the Internet era, people are confident and conscious about what they want from online news, social media and digital media. So how can brands and business ensure audiences switch on to their communications?

Beyoncé, Taylor Swift, Barbenheimer To Add \$8.5 Billion to US Economy in Q3

Help people organize their fun

The pandemic accelerated the trend towards planned social activity. So, how can brands earn attention in a world where everything from a quiet night in, to a big night out is planned and documented with military precision?



Make them laugh

People have had enough of sadvertising and want to be entertained. How can brands who have focused for a decade on content that moves and inspires learn to tell jokes again?

The rise of the choiceful consumer

It might be time to forget doom-scrolling and fears of a generation of young people who can't tell the real from the digital. A growing body of research suggests that people are confidently taking back control over their media lives.

The rise of a more choiceful consumer means it's time for brands and business to rethink the tone of their communications, the formats they use and even experiment with ways to take engagement offline.

* Reuters Institute Digital News Report, 2023

** Ofcom Media Nations, 2023

The end of sensationalism



Reuters Institute research shows that **36% of people now actively avoid the news***. The stark polarisation that has driven news and social conversation is turning people off. Less than half of people saying they follow news while **X (formerly Twitter) has lost 13% of its users under Elon Musk's controversial stewardship**. In an environment where people are prepared to turn off, brands can no longer rely on sensationalism as a route to engagement.

Have we passed peak video?

MEDIA

The streaming wars are over, and it's time for media to figure out what's next

Video consumption in the UK has come down 30 minutes since 2020** and stabilised, with social video winning a greater proportion of overall viewing. Weakening subscriptions for Disney+ and the launch of Meta's Threads as a consciously text-first social network suggests there is a natural ceiling for video consumption. Smart brands will keep a close eye on video metrics in 2024 and consider how they can communicate more in other formats.

The return of analogue



#BookTok

198.3B views

The resurgence of vinyl records, the return of film cameras, the survival of print books (itself driven by BookTok) and an emerging collector culture for video cassettes and DVDs suggests people are softening on subscription and interested in owning what they enjoy again.

Brands and businesses keen to connect more deeply with consumers could also consider returning to analogue media in 2024.



Help people organize their fun

As hybrid working and social media continue blurring the boundaries between labour and leisure, people are working smarter and harder to fit fun into schedules and around their responsibilities.

This doesn't mean people are too busy for brand communications and messages. **But brands in 2024 will also have to work harder to earn people's scarce attention during carefully planned leisure time.** The greatest opportunity for brands to engage their customers might lie in helping them do nothing at all.

Maximising the big moments

Taylor Swift's Eras Tour Projected To Rake In Absurd Amount — And Rank Her Above These Notable Billionaires



At a time when a Beyonce or Taylor Swift tour can impact national GDP, it's never been more important for brands to have a place – or a point-of-view on big cultural moments.

Brands that make the most of these opportunities will learn from what sports marketers know well. The build-up to and aftermath of these events is often just as important – and more fun – as the moment itself.

Finding joy in the mundane

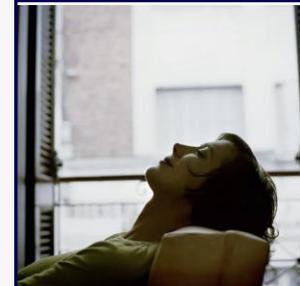
The Mundane Thrill of 'Romanticizing Your Life'

A trend that took off early in the pandemic encourages people to appreciate life's simple pleasures, a philosophy that resonates just as strongly two years later.

Trends like 'romanticize your life' on Tik Tok show people are rejecting the FOMO that defined social media in the '10s., They're learning to elevate the everyday and prioritise relatability.

This offers interesting opportunities to brands in low interest categories. For the first time in a long time, it's cool to be a bit boring.

Making space for nothing



Niksen is the Dutch lifestyle trend that celebrates doing absolutely nothing

BY MEGAN MURRAY & AMY BEECHAM 14 DAYS AGO



The enforced busy-ness of work and intricate social lives means doing nothing is a planned activity.

Brands have a role to play in helping people to just be. For example, could employers build trust by actively encouraging their workers to take time out.

Make them laugh

Now that everyone is one funny video away from global fame, brands are following people in embracing their sense of humour.

Sadvertising, which is now inextricably linked with pandemic advertising, is out. Laughter is in and the brands and businesses who build trust in this environment will find ways to communicate what they're doing with a joke and a smile.

Yet after a long period in which earnestness dominated brand communications, how can business learn to be funny again?

Aspiration gives way to goofiness



Selena Gomez's Most SELF-DEPRECATING TikToks

The tone of social media has shifted. Aspiration, which defined the '10s and gave way to performative vulnerability during covid is over. Instead, everyone from Hollywood celebrities to OnlyFans creators make fun of themselves with goofy content.

Some brands – notably Duolingo and Burger King – have navigated this shift with aplomb. It does raises challenges for many brands and businesses with highly centralised Thriving in this era means being open to experimentation – and risk.

Tell jokes like a local



Everyone likes a joke, but what they laugh at is a local matter. For global brands this means that local market knowledge is essential. Success stories such as the prank Brazilian payment card Flash played on Nike over the cost of a Brazil football shirt show how brands can build trust in this era. A deep understanding of culture and behaviour can convince people that even the biggest company is on their side.

Humour doesn't have to be trivial



Humour's ability to convey complex ideas, resolve tension and create openness is under-used by brands. Apple's recent viral sustainability video points how humour can be deployed intelligently to bring life, credibility and attention to even the 'driest' and most complex subjects.



How can brands & business follow these new rules for engagement?

More optimism, less sensationalism

People are turning away from media that traps them in a cycle of anger and anxiety.

Brands and business can help their audiences do this by focusing on content, messages and experiences that feed rather than exhaust them.

Put a pause on sadvertising

There is a lot to be sad about in the world. People don't currently want brands to add to that pile.

Brands that help people find joy, optimism and a sense of fun - at the right time - will earn consumers' attention, consideration and advocacy.

Earn every second of attention

In a world where every minute of spare time is planned, brands must justify the time they want consumers to spend with them.

The solution lies in adopting a truly earned mindset. Consider how even the smallest interaction with consumers fits into their lives, reflects their concerns and solves their problems.

What comes next?

As we move into 2024

Understand what holds audiences back from feeling **the optimism they need to look forward**

Define the organisation's role in **driving and instilling optimism**

Evolve communications so they deliver **more local relevance, more humour, less sensationalism**

Explore actions to take that will instill confidence - **helping people, and society, look forward in 2024**



Thank you

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A perspective on the year to come in
communications from Edelman Strategy
November 2023

**Want to know more about
the themes and information
in this report?**

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