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FROM CX TO HX

Unleashing the energy of human-first experiences to empower marketing of the future

CO-BRANDED REPORT 2020

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FOREWORD

John Harris
Chief Executive Officer
Worldwide Partners

Coming out of a global pandemic, marketers cannot simply prepare for a new normal. They must embrace a new marketing model that empowers humans rather than targeting customers.

In a world of over-choice on demand, brands need to deliver a Human Experience. HX requires forging genuine, human connections in an increasingly digital world, and making the leap from personalized to personal marketing.

HX is the new premium. More than all its features and benefits combined, a brand's Human Experience, or HX, will determine its ultimate value.

HX is a step change from the CX standard.

- CX identifies you; HX understands you.
- CX delivers a more satisfying transaction; HX enables a more fulfilling life.
- CX intercepts people with reasons to believe and ways to buy; HX provides a continuum of engagement that improves people's lives.

It's time we put our money where our mouths are on brand relationships. People's rising expectations demand it.

To understand how changing expectations will shape HX across key business verticals, Worldwide Partners and GlobalWebIndex explored this growing demand for the human experience. Using data from GlobalWebIndex's Core Survey across 46 global markets, we analyzed how this demand has changed across consumer attitudes and perceptions over time. And through additional research in the U.S., UK, China, Brazil, Mexico, and Germany, we explored key facets of this trend to enrich the picture. Our findings show a way toward marketing that makes a greater difference than ever.

1. WHY BRANDS NEED A HUMAN TOUCH

Think about the last time you went an entire day without checking your email. How about checking your phone? How about looking at any screen at all? It's hard, if not impossible, to reflect on this accurately because our lifestyles are mediated by technology.

Now think about the weight of this as a marketer. Not only are consumers' interactions with their work, school, family, etc. mediated by screens - but so are their interactions with your *brand*. For as much as technology has facilitated innovative marketing, it has inevitably created a barrier between the consumer and the brand.

This is important now, perhaps more than ever, because we are at a point of inflection in consumers' relationship with technology. With people torn between a desire for technology's conveniences and a concern about its influence in our lives, we are seeing the rise of "tech angst." Marketers cannot ignore this. If we don't respond to consumers' growing pain points around technology, our products, services, and messages risk becoming out-of-touch, disengaged, and - ultimately - irrelevant to the end consumer.

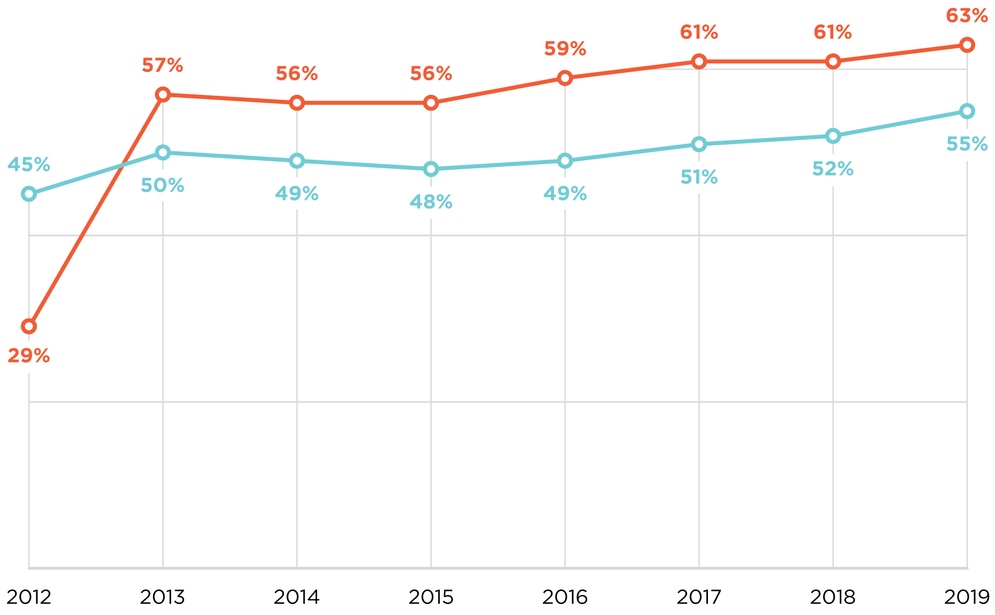
In this report we'll explore a potential solution to this problem, something both familiar and distant to today's modern consumer: the human touch. Across many verticals in the industry, shifting our focus from a traditional customer experience (CX) to a human experience (HX) can empower marketers for a fast-approaching future.

TECHNOLOGY IS CHEAP, EASY, AND EVERYWHERE

> Human experience can elevate brands from transaction experience to brand culture experience, resulting in stronger trust and better customer relationships.
>
> **HELEN LO**
> **HEAD OF STRATEGIC PLANNING**
> **WE MARKETING GROUP**
> **WORLDWIDE PARTNERS, CHINA**

MORE CONNECTED THAN EVER BEFORE

% of global internet users who agree with the following statements



To truly understand "tech angst," we need a bit of context as to how we got here. In short - technology is cheap, it's easy, and it's everywhere. Rapid developments have led to near-universal access to technology; it is the great equalizer of society.

For brands that are looking to leverage HX to market premium goods or services, this is especially important to consider. While "high tech" used to be a premium, reserved for affluent and high-powered groups, it's now become democratized in a way that has reversed this exclusivity. Having a device and being tied to it all the time is a fundamental part of mass culture. Brands that seek to elevate themselves beyond mass cultural appeal, to emphasize an ethos of ingenuity and uniqueness, can do so by balancing their digital footprint with human-first messaging, experiences, and activations.

Question: To what extent do you agree/disagree with the following statements below on your outlook on technology and the web?
Source: GlobalWebIndex Core Survey 2012-2019 (averages of all waves conducted each year)
Base: Global internet users aged 16-64: 61,196 (2012), 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 303,502 (2017), 391,130 (2018), 493,256 (2019)

THE MORE CONNECTED WE BECOME, THE MORE WE RESIST

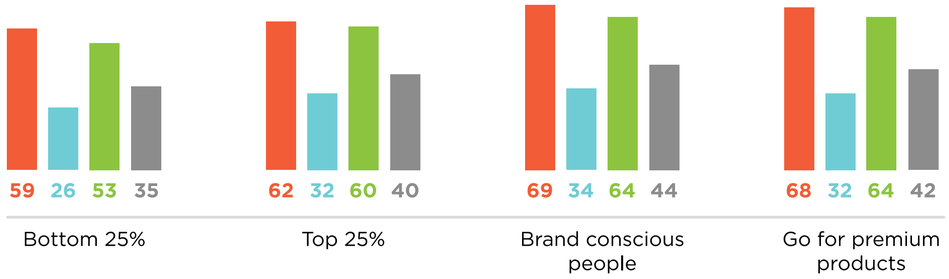
How pervasive is "tech angst" really, and is it a concern for your marketing strategy? The data tells a story, and we need to pay attention.

Not only are we more connected than ever before, we're more resistant to this connectivity. Consumers are growing increasingly concerned with technology's constant presence in their lives, and they are pushing back. This is exaggerated among the target audiences for premium or luxury products.

There are serious implications for how brands can best engage with their end users as a result. Forcing users to download yet another app or plug-in, opt in to yet another newsletter, or be continuously encouraged to "like and share" on social media, exaggerates "tech angst" and makes those brands part of the problem. Technology is already making life more complicated for people, but engaging with your brand doesn't have to.

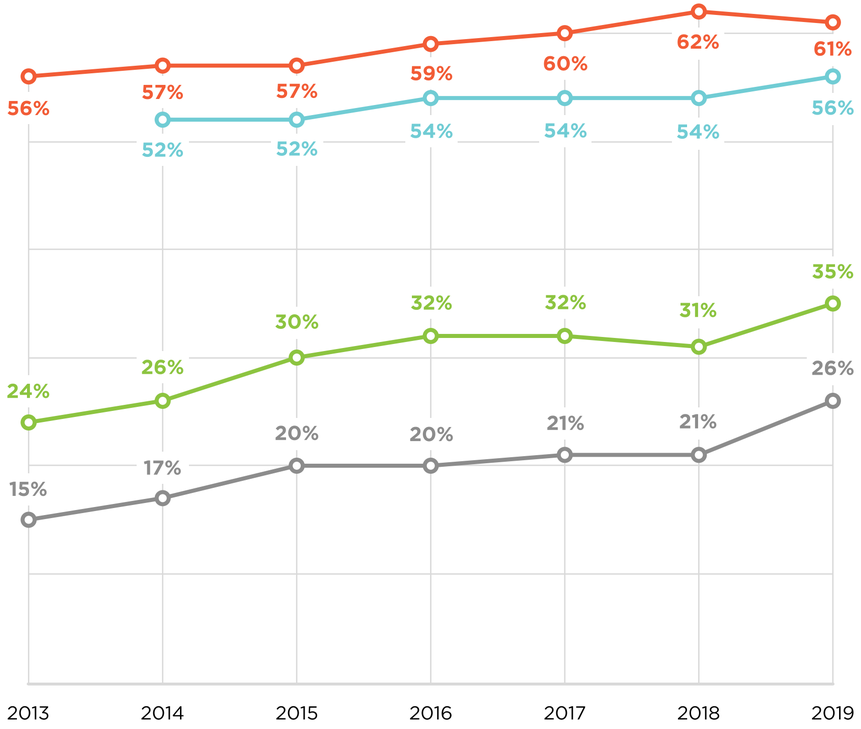
PREMIUM TARGET AUDIENCES ARE AMONG THE MOST RESISTANT TO TECH

% of global internet users who agree with the following statements



GROWING RESISTANT TO TECHNOLOGY'S ROLE IN OUR LIVES

% of global internet users who agree with the following statements



KEY FOR BOTH CHARTS

- *I am concerned about the internet eroding my personal privacy*
- *I just don't understand computers and new technology*
- *I prefer to be anonymous when using the internet*
- *Technology makes life more complicated*

Question: To what extent do you agree/disagree with the following statements below on your outlook on technology and the web? **Source:** GlobalWebIndex Core Survey 2019 | GlobalWebIndex Core Survey 2013-2019 (average of all waves conducted each year) **Base:** 493,256 global internet users aged 16-64 | Global internet users aged 16-64: 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 303,502 (2017), 391,130 (2018), 493,256 (2019)

TECH FATIGUE MAKES US CRAVE HUMAN EXPERIENCE

The demand for human-based experiences is only set to rise in the aftermath of COVID-19. Lockdown life has tied consumers to their devices, exacerbating their tech fatigue.

Research conducted at the height of lockdown revealed that, across 17 global markets, 94% of consumers reported spending longer on internet-connected devices. Most people were spending longer on digital media across 3 phases of this study, conducted at various points in March and April 2020. However, initial increases in connected media activity have leveled off. Behaviors away from the screen have been consistent in their growth, however - like cooking, reading magazines, and reading newspapers.

This data offers a glimpse into our radically different future post-crisis. For brands and the marketing professionals that work with them, reorienting to human-first experiences and messaging will be more important than ever.

LEVELING OFF OF SCREEN-MEDIATED, BUT NOT ANALOG, BEHAVIORS

% of internet users across global markets who said that they were doing more of the following during the COVID-19 lockdown, over time

	PHASE 1 March 16-20	PHASE 2 March 21-2 April	PHASE 3 April 22-27
Screen behaviors			
Using smartphone/mobile phone	70%	76%	71%
Watching more shows/films on streaming services	51%	57%	52%
Watching more TV on broadcast channels	45%	47%	43%
Spending longer on social media	44%	47%	44%
Non-screen behaviors			
Spending more time cooking	41%	41%	44%
Reading more magazines	14%	16%	17%
Reading more newspapers	16%	19%	20%

Question: Which of the following have you been doing at home due to the coronavirus/COVID-19 outbreak?
Source: GlobalWebIndex Multi-Market Coronavirus Study, Waves 1-3
Base: 12,845 internet users aged 16-64 across 13 global markets (Wave 1), 15,079 internet uses aged 16-64 across 17 markets (Wave 2), and 15,274 internet users aged 16-64 across 17 markets (Wave 3)

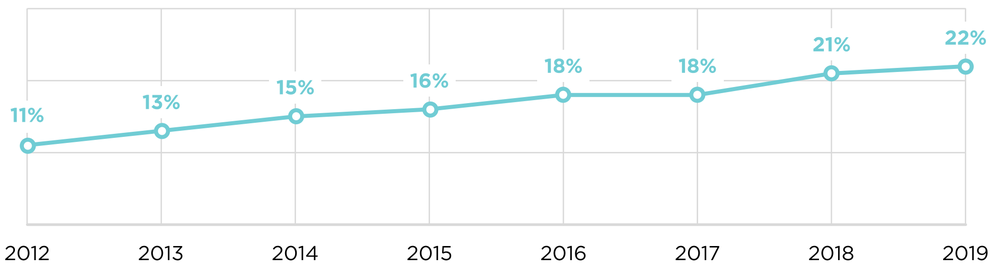
2. HEALTHCARE

For brands and agencies operating in the high-touch healthcare space, it is especially important to humanize delivery. A trifecta of factors – advancements in health tech, the psychological barriers to accepting them, and the unique reality of healthcare post COVID-19 - make this point in time crucial for brands to embrace HX strategies.

WE HAVE MOVED CAUTIOUSLY TOWARD DIGITAL HEALTHCARE

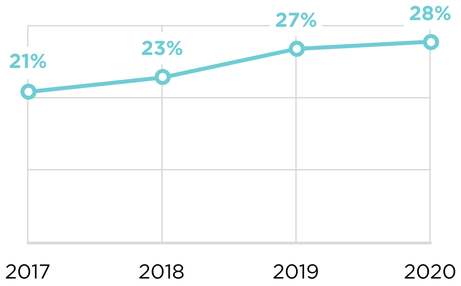
HEALTH AND FITNESS APP USAGE HAS GROWN STEADILY

% of global internet users who report having used a health/fitness app in the past month



THE VOICE OF THE INTERNET IS INCREASINGLY IMPORTANT WHEN MAKING HEALTHCARE DECISIONS

% of global internet users who report that information or recommendations found online are "very important" when choosing which medicines to buy

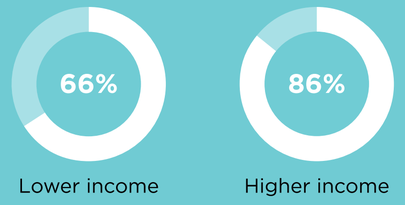


The first of these factors, advancements in health tech, reveals an industry on the cusp of explosion. Industry **analysis** and consumer research both point to digitization in the health space being positioned for widespread adoption. The progress thus far, however, has been cautious - at least in digital timelines. For example, though internet recommendations have become increasingly important for choosing medications, it's still the lowest factor among all. Doctor recommendations are nearly 2.4x as important, and brand recognition is 1.75x as important. Though health/fitness app adoption has doubled since 2012, by 2019 it was only about one-third the level of shopping apps, and 65% lower than banking apps. But something has made us shift gears, and we're set to move from cautious progress to wide-scale digitization as a result.

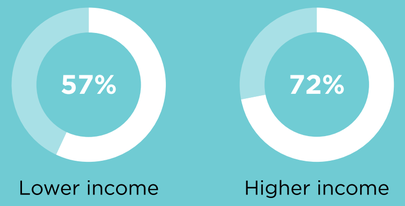
HIGHER INCOME AUDIENCES MORE OPEN TO THE ROLE OF TECHNOLOGY IN THEIR HEALTHCARE

% of U.S./UK internet users who NET agree with these statements

"I think technology will increasingly play a key role in managing my health and wellbeing in the next 3-5 years"



"AI and machine learning will reshape the healthcare environment as we know it within the next 10 years"



Question: In the last month, which of these app types have you used?
Source: GlobalWebIndex Core Survey (average of all waves conducted each year) 2012-2019
Base: Global internet users aged 16-64: 61,196 (2012), 156,876 (2013), 168,045 (2014), 197,734 (2015), 211,023 (2016), 370,051 (2017), 474,573 (2018), 598,185 (2019)

Question: When choosing medicines/drugs for everyday ailments (e.g. a cold, sore throat, headache, etc), how important are the following things for you when deciding which brand to buy?
Source: GlobalWebIndex Core Survey 2017-2020
Base: Global internet users aged 16-64: 153,111 (2017), 209,346 (2018), 270,701 (2019), 80,925 (2020)

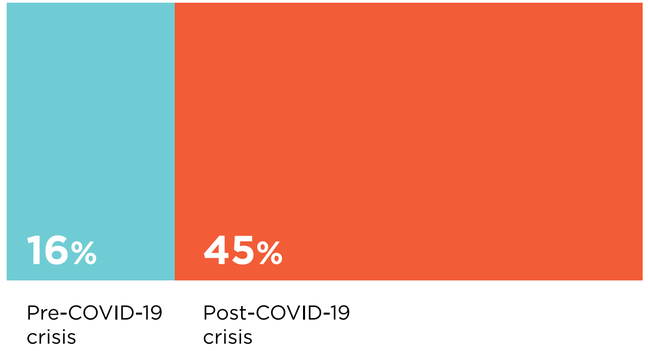
Question: To what extent do you agree with the following statement?
Source: GlobalWebIndex Health Study October 2019
Base: 2,681 (U.S) and 2,864 (UK) internet users aged 16-64

THE PANDEMIC IS ACCELERATING TELEHEALTH

> Many patients with pre-existing conditions made personal sacrifices to withdraw completely or reduce their engagement with the healthcare system for the greater good of us all, because of COVID-19. Now, health brands must quickly re-activate these patient populations to engage again by acknowledging their altruism and endorsing the legitimacy of their very real and human health needs.
>
> **ANDREW BAST**
> **CHIEF STRATEGY OFFICER**
> **GREATER THAN ONE**
> **WORLDWIDE PARTNERS, EUROPE, UK, U.S.**

THE COVID-19 CRISIS HAS ACCELERATED OUR ACCEPTANCE OF TELEHEALTH

% of U.S./UK internet users who report making use of a telehealth service



This represents another factor in the trifecta: the role of COVID-19 in accelerating digital health adoption. Its effect on healthcare is set to be transformative.

Already we see technology playing a crucial role in mitigating the crisis, especially via telehealth. While these services did exist pre-crisis, their popularity has skyrocketed in the wake of COVID-19, as many providers have moved toward this model for routine care that respects social distancing. In the U.S. and UK, only about 16% of consumers said they had ever used telehealth pre-COVID-19. By peak lockdown, this had nearly tripled to 45%. Furthermore, 53% of internet users in these markets said they would consider using telehealth to get screened for coronavirus symptoms.

Telehealth, as many providers and brands know, can be one of the crucial tools in the arsenal for making sure at-risk patients can access the care they need in a time-sensitive way. And this has proven an issue now, more than ever, as a global health crisis has deterred many vulnerable patients from seeking the routine care they need due to fears of infection. Embracing, refining, and rolling out telehealth initiatives can be enormously beneficial for providers – but it has to be done the right way.

Question: Have you used a digital health service that allows you to easily consult with a doctor by phone/video call instead of an in person visit in the past 12 months? | Which of the following, if any, have you sought health advice for via a telehealth service?
Source: GlobalWebIndex Health Study October 2019, COVID-19 Study April 2020
Base: 2,681 (U.S) and 2,864 (UK) internet users aged 16-64; 2,237 (U.S) and 1,585 (UK) internet users aged 16-64

THE IRREPLACEABLE DOCTOR-PATIENT RELATIONSHIP

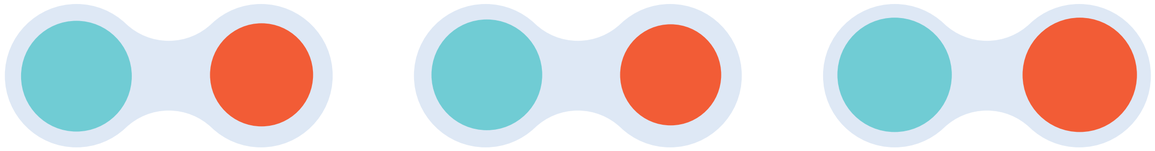
Essential to the effective rollout of telehealth and other technology-enabled healthcare is the third factor of our trifecta - responding to psychological barriers. Caregivers, manufacturers, and marketers in the healthcare space need to balance how they implement and communicate the benefits of technology with the inherent need for a human touch.

To illustrate this point, we can look at both the biggest complaints with existing healthcare and concerns for future healthcare. When it comes to their current care, nearly one-third of U.S./UK consumers complain that doctors' appointments can feel rushed, and one-quarter feel that they don't get the full and personal attention of their doctor.

The one-to-one relationship between a doctor and their patient seems to be irreplaceable. Consumers are open to interacting with their doctors via telehealth services, but the number one most preferred way to communicate is, by far, in person.

THE DECLINE OF THE PERSONAL RELATIONSHIP ALREADY WELL UNDER WAY

% of U.S./UK internet users who are unhappy with their current healthcare due to the lack of personal attention



30% | 26%
All

30% | 25%
Lower income

32% | 32%
Higher income

- Doctor appointments can feel rushed
- Don't have the full and personal attention of their doctor

THE DOCTOR'S OFFICE REMAINS AN INHERENTLY HUMAN PLACE

% of U.S./UK internet users who would prefer to communicate with their doctors via the following methods

67%
In-person

51%
Phone call

47%
Video call

39%
Email

35%
SMS/texting

22%
Social media/ messaging apps

Question: When it comes to your healthcare experience, what are your biggest frustrations, if any?
Source: GlobalWebIndex Health Study October 2019
Base: 2,681 (U.S) and 2,864 (UK) internet users aged 16-64

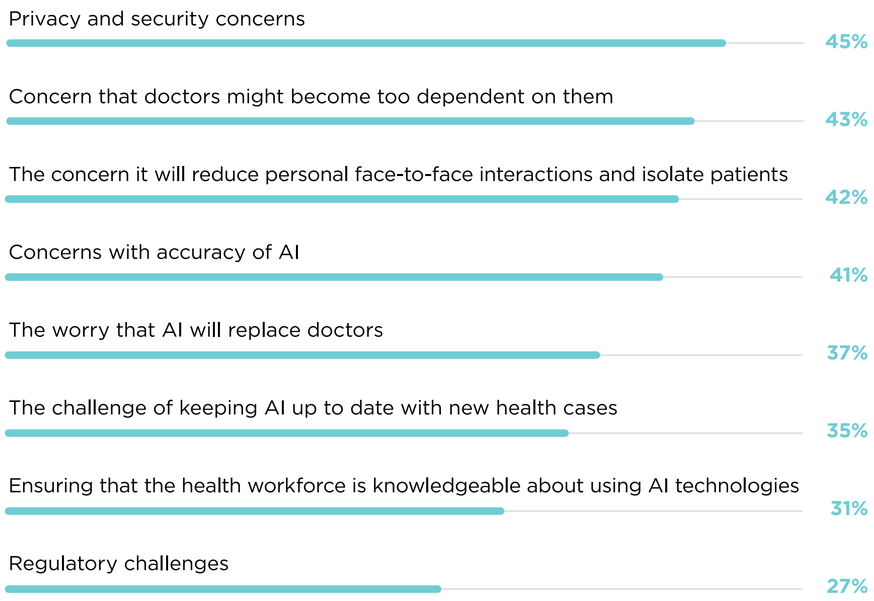
Question: From the following, please select how you would like to communicate with your doctor/healthcare provider in future
Source: GlobalWebIndex Health Study October 2019
Base: 2,681 (U.S) and 2,864 (UK) internet users aged 16-64

WHEN AI NEEDS A BEDSIDE MANNER

Concerns about impersonal healthcare are likely to intensify due to feelings about AI. One of the primary concerns with integrating AI into the healthcare experience is that it will chip away at human interaction between doctors and patients. And what's more, it surpasses some of the more practical fears about quality of care. More consumers are worried, for example, about AI reducing face-to-face interactions with their doctor than they are about the accuracy of AI, that AI can keep up with new health cases, or that the healthcare workforce is actually knowledgeable about using AI in practice.

REPLACING PERSONAL INTERACTIONS AMONG BIGGEST CONCERNS FOR AI IN HEALTHCARE

% of U.S./UK internet users who report the following as potential challenges of AI in healthcare



> The mental burden of dealing with a lockdown is a big topic in many countries. People are more afraid, they feel isolated, they suffer from signs of depression, etc. Finding ways of helping chronic patients deal with this mental burden without having to leave their homes is a challenging, but important, task that both HCPs and healthcare companies can engage in to truly show that they are connected with their users beyond just the medical condition.

SOFIE SVARRE
PARTNER/DIRECTOR OF INSIGHTS & STRATEGY
ADVANCE
WORLDWIDE PARTNERS, DENMARK

Question: What do you think are the potential challenges of AI (Artificial Intelligence) and machine learning applications in healthcare?
Source: GlobalWebIndex Health Study October 2019
Base: 2,681 (U.S) and 2,864 (UK) internet users aged 16-64

THE WORLDWIDE VIEW

For technology providers in the healthcare space and the marketers that work with them, preserving the element of human relationships is crucial. Patients need trust, reassurance, and comfort – not just timely and accurate diagnostics. But how, specifically, can brand marketers integrate these elements into their strategy?

ENSURE THAT TECHNOLOGY CAN IMPROVE THE BACK END, WHILE EMPHASIZING HUMAN INTERACTIONS AT THE FRONT END

Utilizing tech solutions to streamline some of the most impersonal parts of the healthcare process - such as data entry and insurance paperwork - can free up professionals to have more attentive time with their patients. Advancements in voice tech, for example, can be used for healthcare professionals to communicate with each other or record patient details without needing to constantly divide their attention between their patients and their screens.

TAKE CARE OF THE SMALLER DETAILS, BECAUSE THEY BUILD EVERY PERSON'S UNIQUE "BIG PICTURE"

People often find comfort in the small, familiar details - music, smells, and images that bring them back to times of ease and happiness. Giving patients and their families some level of control over small things like this when receiving care not only humanizes a clinical - and often stressful - environment, it also empowers them. Part of embracing HX is in understanding that what makes people human is their unique story, their unique "big picture" - and what is a big picture without the little details?

PUT HEALTHCARE PROFESSIONALS' VOICES AT THE FOREFRONT

The trust that consumers place in doctors and nurses is irreplaceable. Working collaboratively with healthcare professionals to put their stories, advice, and voices into healthcare communication can be effective at strengthening the human connection that consumers want. When doctors ensure patients that tools, systems, and technology are enabling them to do their jobs more efficiently - and focus on the direct patient care that matters - this can provide an invaluable level of comfort and confidence.

BRAND IN ACTION: INSPIRA

Maternity services are the entry point for a lifetime of medical care for mothers, children, and families at large. Thus, investing in the maternity experience can reap benefits for a health system for many years to come. Research shows that expectant mothers often devote time and attention to planning their birth experience, from the music that's played during delivery to the snacks they want on hand in recovery. They have a comprehensive birthing plan. Inspira, a New Jersey-based health organization, used HX strategies to help expectant mothers make the birthing experience their own.

Inspira went to market with an integrated marketing and advertising campaign from Worldwide Partners agency Brownstein Group that articulated a message of empowerment for expectant mothers. The campaign, "Own Your Pregnancy," showed women that Inspira Health was committed to helping them deliver their child the way they wanted – with premium amenities and comfort, as well as personalized, human-centered care that put them in charge of their birthing experience.

3. CONSUMER PACKAGED GOODS AND RETAIL

For CPG brands and marketers, forging deep connections with consumers presents a unique challenge because of how impersonal product manufacturing, distribution, and purchasing have become. So how do brands differentiate? In the eyes of consumers, what really makes one product any different from – or any better than – its competitor if both are assumed to be mass-produced in the same nameless warehouse? This is where HX strategies come into play across key areas – brand storytelling, production, and purchase touchpoints.

CONSUMERS WANT A FACE, A STORY, A COMMUNITY

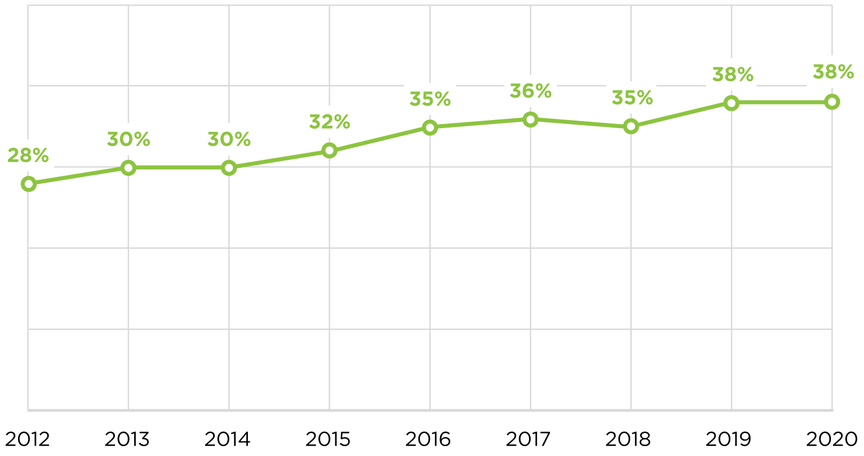
> With technology driving greater personalization and customization of experiences, and consumers demanding greater authenticity and more ethical experiences, the pressure on brands to be more human, more empathetic, and more real will become even greater.

IAN MCATEER
CHAIRMAN
THE UNION
WORLDWIDE PARTNERS, SCOTLAND, UK

One solution to this is to communicate the human factors involved in a brand's origins, values, and evolution. What people want to see from brands has changed - they want personality, connection, and social values. Between 2012 and 2020, for example, the number of consumers who said they would buy a product or service simply to be a part of the community built around it grew by 36%. People want to see that the things they buy are in some ways tied to a real human story or community – be it a dairy farm run by generations of the same family, or an organic cosmetics label founded by college roommates.

WHAT CONSUMERS WANT FROM BRANDS IS CHANGING

% of global internet users who say that they would buy a product/service simply for the experience of being part of the community built around it



Question: To what extent do you agree/disagree with the statements below on your perception of yourself?
Source: GlobalWebIndex Core Survey 2012-2019 (averages of all waves conducted each year)
Base: Global internet users aged 16-64: 197,734 (2015), 211,023 (2016), 303,502 (2017), 391,130 (2018), 493,256 (2019), 143,232 (2020)

PERCEPTIONS OF VALUE FOR "HANDMADE" AND "CRAFT" GOODS VARY BY MARKET

ESTABLISHED VS. INDEPENDENT AS MARKERS OF QUALITY DIFFER ACROSS MARKETS

% of food/drink buyers across global markets who say they associate the following attributes with higher quality grocery products

	Brazil	China	India	Mexico	UK	U.S.	Germany
Established/Recognizable Brand	61%	65%	53%	70%	34%	50%	25%
Organic or sustainable production	55%	62%	61%	50%	39%	39%	51%
Positive Company Values	41%	56%	53%	37%	27%	33%	21%
Local Production	39%	26%	38%	48%	38%	36%	64%
Independent/Family-Owned Farm	38%	25%	31%	21%	38%	32%	37%
Craft/Handmade	30%	41%	29%	38%	32%	27%	45%
High Price	11%	21%	18%	17%	39%	24%	28%
Celebrity/Influencer Endorsement	9%	18%	19%	9%	8%	15%	4%

"In a post-COVID-19 society, FMCG brands will need to truly differentiate to win. This is not just where or how they advertise, but how well they can solve their customers' problems. This means a refreshed understanding of their wants, needs, and challenges, and where the brand can make a positive difference. Change with the changing customer.

ED HENDERSON
PLANNING DIRECTOR
ARDMORE ADVERTISING
WORLDWIDE PARTNERS
NORTHERN IRELAND, UK

Question: Which of the following do you associate with higher quality food/groceries?
Source: GlobalWebIndex/WPI Study March 2020
Base: 324 (Brazil), 273 (China), 306 (Germany), 287 (India), 284 (Mexico), 907 (U.S.), 982 (UK) respondents who said they have purchased food/groceries in the last 30 days

Just as the human story behind a brand is important, the human factor in its production matters. One very important point here, however, is the difference between emerging and mature markets.

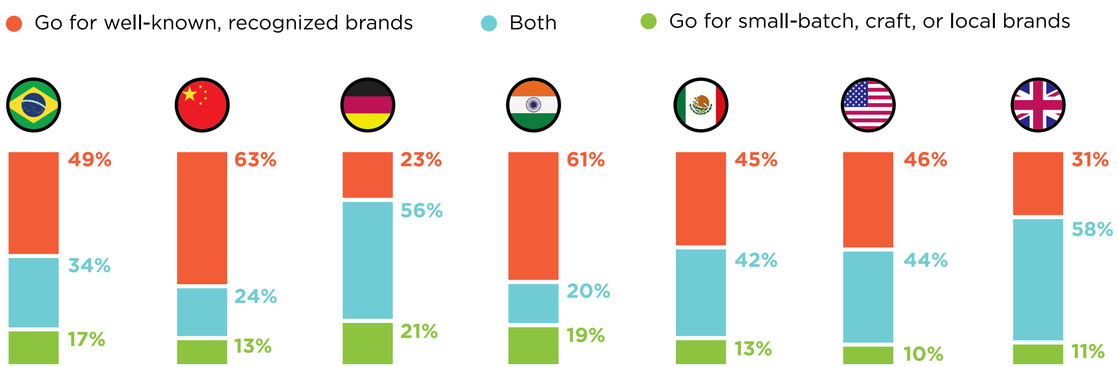
In the food and alcohol space, human elements in production often manifest through qualities like “craft” and “handmade.” These markers typically signify that each individual product is slightly different and special from the others, rather than laser-cut to identical machine precision.

And this is certainly true in many places. But, as marketers know, localization is imperative. The data shows us that it’s mature markets, rather than emerging ones, which often place greater value on these attributes. Traits like “craft,” “handmade,” and “independent” are more likely to be associated with high-quality food products relative to other attributes in mature markets vs. emerging ones. In China, for example, an established brand is nearly 60% more likely to be considered higher quality vs. something that’s craft or handmade. While in the UK, the importance of these factors is nearly the same, and in Germany, it’s actually the handmade product that’s perceived as better.

In India, 61% of food shoppers opt for well-known or established brands when making purchase decisions, as do 63% in China. By comparison, 46% of shoppers in the U.S. say this, as do 31% in the UK, and only 23% in Germany.

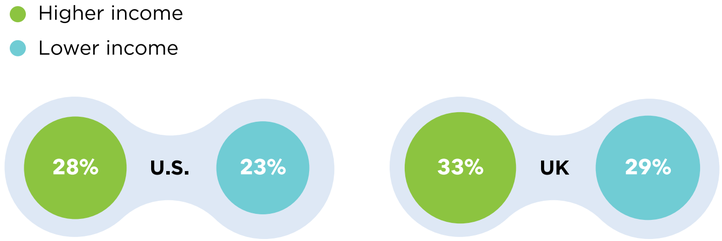
A PREFERENCE FOR ESTABLISHED BRANDS IN EMERGING MARKETS

% of food buyers who go for well-known vs. craft brands when buying grocery/food products



IN MATURE MARKETS, CRAFT IS OFTEN A PREMIUM

% of food buyers in the U.S./UK who see “craft/handmade” as a marker of greater quality for food products



Question: When buying food products, I usually...
Source: GlobalWebIndex/ WPI Study March 2020
Base: 324 (Brazil), 273 (China), 306 (Germany), 287 (India), 284 (Mexico), 907 (U.S.), 982 (UK) respondents who said they have purchased food/ groceries in the last 30 days

Question: Which of the following do you associate with higher quality food/ groceries?
Source: GlobalWebIndex/ WPI Study March 2020
Base: 306 (Germany), 907 (U.S.), 982 (UK) respondents who said they have purchased food/ groceries in the last 30 days

THE ONLINE PURCHASE PROCESS NEEDS HUMAN INTERACTION

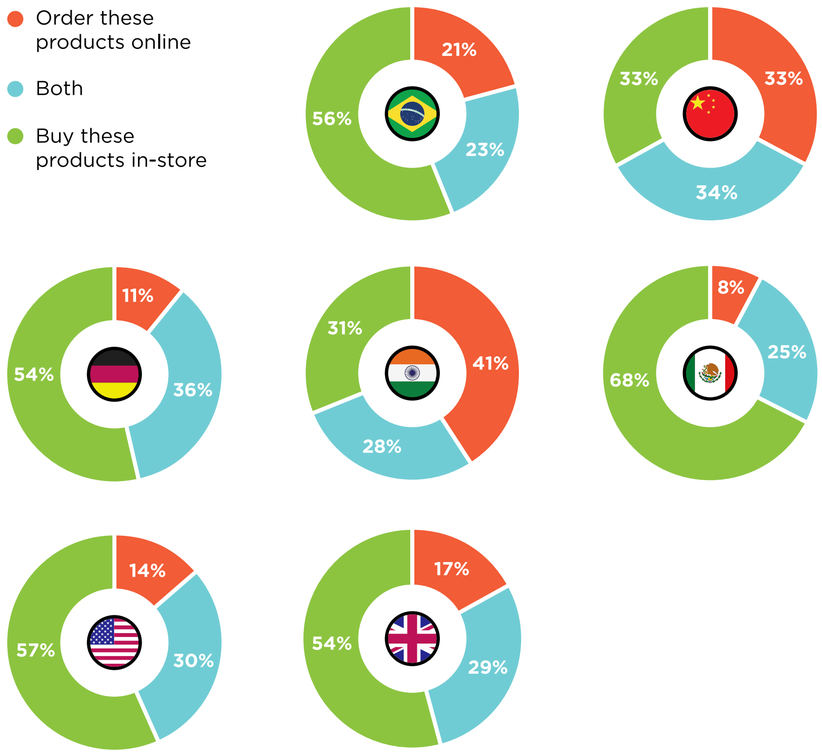
With the rise in online shopping, next-day delivery, and in-store self-checkouts, consumers today often have little or no interaction with another person throughout their purchase journeys. For brand marketers in the CPG space, this presents a unique challenge because of what we know about technology's complicating effects on the consumer mindset. When technology is both the bridge and the barrier to engaging with your brand, integrating HX in the purchase process becomes crucial.

When looking to understand where the ultra-humanized trend is more developed, we see again the similar split down geographic lines. In mature markets, consumers tend to opt for humanized elements of the purchase process to a stronger degree, while those in emerging markets – notably in Asia-Pacific – embrace the online purchase process. Across Germany, the U.S., and the UK, less than 20% of personal care buyers are opting to go online for these purchases. In China this is at 33%, while in India it's even higher, at 41%.

> "Retailers must use this moment to rethink their business. The proximity and human experience of the physical retail environment has to merge with the rapidly accelerating consumer pivot to online shopping."
>
> **VITOR BARROS**
> **CEO**
> **PROPEG ADVERTISING**
> **WORLDWIDE PARTNERS, BRAZIL**

THE ONLINE PERSONAL CARE MARKET BOOMS IN ASIAN MARKETS

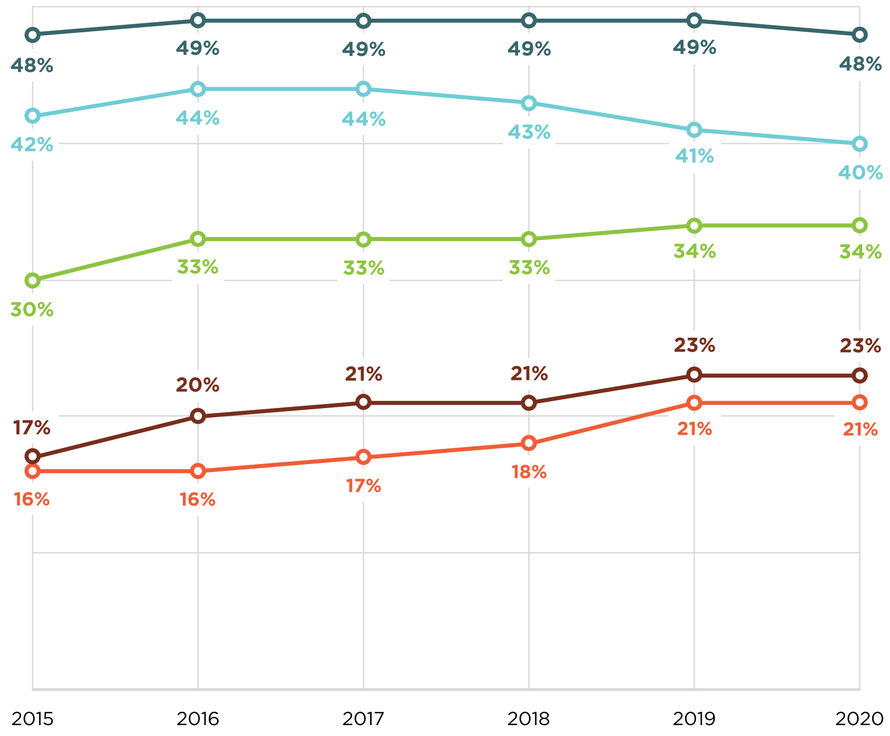
% of personal care shoppers who typically order products online vs. buy them in-store



Question: When buying personal care products, I usually...
Source: GlobalWebIndex/ WPI Study March 2020
Base: 275 (Brazil), 203 (China), 226 (Germany), 247 (India), 267 (Mexico), 770 (U.S.), 797 (UK) Respondents who said they have purchased personal care/beauty products in the last 30 days

THE HUMAN CONNECTION IS MORE RELEVANT THAN EVER IN THE PURCHASE PROCESS

% of global internet users who would be more likely to advocate for their favorite brands for the following reasons



Staying the same

- High-quality products
- Rewards (e.g. discounts, free gifts, etc.)

Increasing

- When I've received great customer service
- The feeling of taking part/being involved
- When I have a personal/one-on-one relationship with a brand

The human element manifests among various touchpoints in the purchase process, such as through recommendations, advice, and personalized service. These techniques are increasingly demanded by consumers. As we've seen through our global data, the key indicators of brand advocacy on the rise in recent years have centered around the human touch: fostering a personal relationship with a brand and receiving great customer service. In contrast, table-stakes attributes like providing high-quality products have remained the same, while discounting has even faltered slightly.

Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Core Survey 2015-2019 (average of all waves conducted each year)
Base: Global internet users aged 16-64: 197,734 (2015), 211,023 (2016), 303,502 (2017), 391,130 (2018), 493,256 (2019)

THE WORLDWIDE VIEW

EMBRACE YOUR ORIGIN STORY, ESPECIALLY FOR ITS IMPERFECTIONS

Consumers increasingly seek real, human connections to the products they buy – and understanding who these products came from can forge those connections. Giving a human face, a family, and a story to your brand humanizes it, and it differentiates your brand from the endless array of similar products that are available in our globalized marketplace. Embracing the imperfections is part of this. What is more human than to struggle?

IN A WORLD OF AUTOMATION AND ECOMMERCE, THE DIFFERENTIATOR BECOMES A PERSON TO TALK TO

For brands in the CPG space, it's critical to identify and retain key human-to-human touchpoints that customers rely on to help them get the best product experience. The ability to ask questions, get advice, and understand how a product is made and used keeps customers connected. It is the promise of this human interaction that customers are willing to pay a premium for, and may also fend off the urge for customers to go "price-shopping."

ADAPT THE APPROACH FOR EMERGING VS. MATURE MARKETS

While a direct approach – elevating artisanal disruptor brands – might be the way to go in mature markets, a different spin on this strategy may work better in emerging ones. This can be done by emphasizing the local, humanized elements of large established brands that are more trusted – whether it's their ingredients or their positive environmental or labor force impact in the community.

4. TRAVEL AND TOURISM

Perhaps no industry has been hit quite as hard as travel in the economic downturn spurred by COVID-19. To reinvigorate travel, brands will need to differentiate themselves, and a key way to do this is by making the move from CX to HX strategies. Embracing an ethos of “back to basics” experiences, helping travelers craft their own “off the beaten path” adventures, and balancing digital activations with opportunities to disconnect from our “tech angst” are ways to do this.

THE RISE OF SIMPLISTIC, "BACK TO BASICS" TRAVEL EXPERIENCES

> The collective personality of the people who live there has always been present in the tourism communications mix. The physical attributes of a place are how it can stand out, but how the locals made us feel is what sticks long after we have left. Get ready to see this human attribute lead the brand narrative for even more countries.
>
> **LANNY GEFFEN**
> **DIRECTOR, CUSTOMER EXPERIENCE**
> **FUSE CREATE**
> **WORLDWIDE PARTNERS, CANADA**

A TRIP ABROAD IS NOT COMPLETE WITHOUT...

% of internet users across global markets who name the following as essential elements for international travel

	Brazil	China	Germany	India	Mexico	U.S.	UK
Visit the main tourist attractions	64%	75%	49%	67%	67%	55%	51%
Eat authentic local food	61%	81%	64%	65%	73%	60%	61%
See the natural environment	60%	72%	58%	74%	61%	55%	50%
Have some time to relax	54%	57%	54%	53%	49%	52%	58%
Learn about the local history	52%	58%	35%	54%	61%	46%	48%
Do something "off the beaten path"	40%	13%	40%	28%	48%	32%	34%
Spend time with the local people	35%	45%	22%	43%	25%	38%	27%
Visit the best museums	29%	39%	14%	37%	40%	43%	27%
Treat myself to something luxurious	22%	27%	13%	33%	24%	20%	19%

Destination marketers can successfully implement HX strategies by focusing on the "back to basics" mentality that consumers are adopting in an increasingly complicated world. The authentic, humanized elements of travel such as local people, food, and natural environments existed long before commercialized tourism, and they are fundamental to the experience. This is especially so in mature markets.

By contrast, more commercialized tourism has an important role to play for travelers in emerging markets. Brazilian, Chinese, Indian, and Mexican travel buyers are more likely than their counterparts in the U.S., UK, and Germany to say that a vacation abroad is not complete without visiting the main tourist attractions. Chinese travelers, for example, are 53% more likely to prioritize this element of travel vs. those in Germany. Keeping these market nuances in mind is essential.

Question: Please choose all the options that complete this sentence: for me, a trip to a new country/region is not complete unless I get to...
Source: GlobalWebIndex/ WPI Study March 2020
Base: 216 (Brazil), 217 (China), 177 (Germany), 222 (India), 208 (Mexico), 433 (U.S.), 537 (UK) respondents who have purchased airline tickets or hotel/lodging in the last six months

CHOOSING YOUR OWN ADVENTURE AND GOING "OFF THE BEATEN PATH"

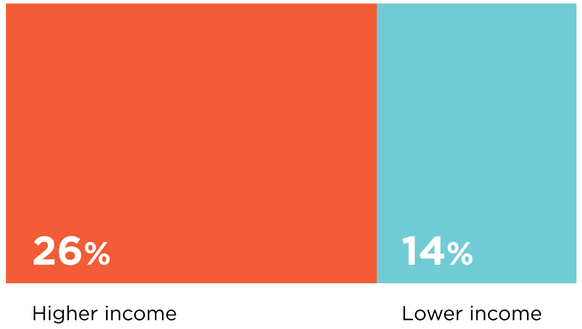
Crafting HX strategy requires understanding that every person wants to be treated as an individual whose path is yet uncharted. This is reflected in consumers' demands from travel operators. Across the board, there's a desire for freedom in planning one's travel itinerary. And among certain travelers, there's a desire to go "off the beaten path" and create their own adventure.

This tendency for the "road less traveled" has mixed appeal across emerging vs. mature markets, skewing more toward the mature. Chinese and Indian travelers, for example, are much less likely to be drawn to this. Among nearly all markets, however, there is a clear pattern – higher income travelers thirst for this sense of adventure more so than lower income groups.

Choosing operators for building their adventure - whether local and independent or global and established – varies by market, as well. In mature markets like Germany, travelers are more inclined to choose local, family-owned tour operators to plan their activities. In China and India, travelers seek the opposite – they are more likely to go for established international operators when planning travel.

GOING "OFF THE BEATEN PATH" OFFERS A DIFFERENT EXPERIENCE FOR PREMIUM TRAVELERS

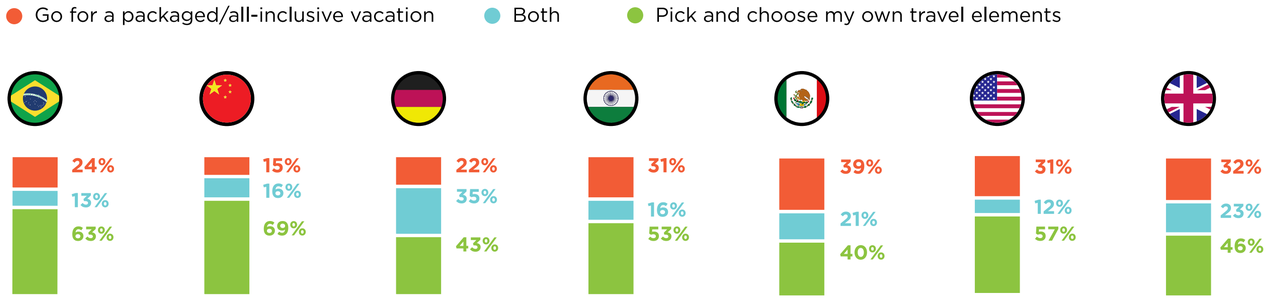
% of internet users who say that a trip abroad is not complete without doing something "off the beaten path"



Question: Please choose all the options that complete this sentence: for me, a trip to a new country/region is not complete unless I get to...
Source: GlobalWebIndex/ WPI Study March 2020
Base: 216 (Brazil), 217 (China), 177 (Germany), 222 (India), 208 (Mexico), 433 (U.S.), 537 (UK) respondents who have purchased airline tickets or hotel/lodging in the last six months

CHOICE AND PERSONALIZATION ARE CRUCIAL TO THE TRAVEL EXPERIENCE

% of internet users across global markets who prefer to choose their own travel elements vs. go for a packaged holiday



Question: When planning my travel, I usually...
Source: GlobalWebIndex/ WPI Study March 2020
Base: 216 (Brazil), 217 (China), 177 (Germany), 222 (India), 208 (Mexico), 433 (U.S.), 537 (UK) respondents who have purchased airline tickets or hotel/lodging in the last six months

IN A MOMENT OF TECH ANGST, TRAVEL BECOMES AN OPPORTUNITY TO DISCONNECT

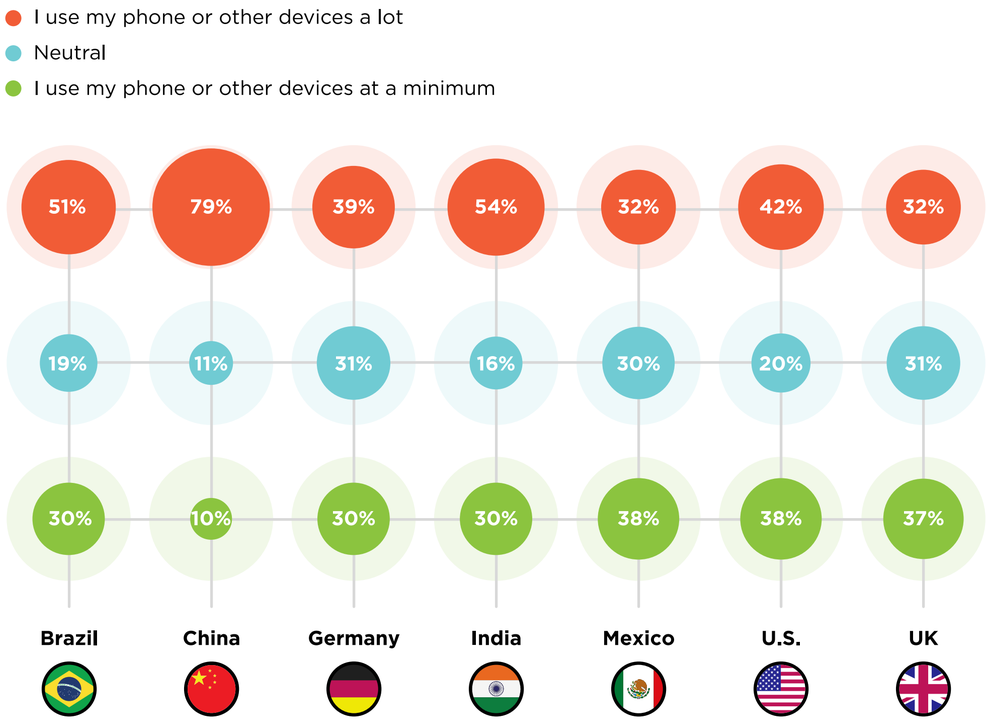
In the height of our "tech angst", travel offers an opportunity for respite – and destination marketers can use this to their advantage. But marketers should know that for consumers, disconnecting is easier said than done. And this is especially true for certain key travel target audiences, like high income groups and emerging market travelers.

What about posting to social media? Arguably, the whole culture around sharing travel experiences has gone so far as to create a backlash against itself. And while part of modern travel is the inevitable FOMO factor, many consumers are going the other way and attempting to detox from the pressures of social media when traveling.

This is particularly the case in mature markets, where more consumers are trying to take a break from social media when they go on vacation. In contrast, travelers from emerging markets increasingly embrace the opportunity to share. Over half of Brazilians opt to post on social media when traveling, while in India, they're nearly 1.3x as likely to post vs. detox.

STAYING CONNECTED VS. UNPLUGGING

% of travelers across global markets who use their phone or other devices a lot vs. at a minimum when traveling

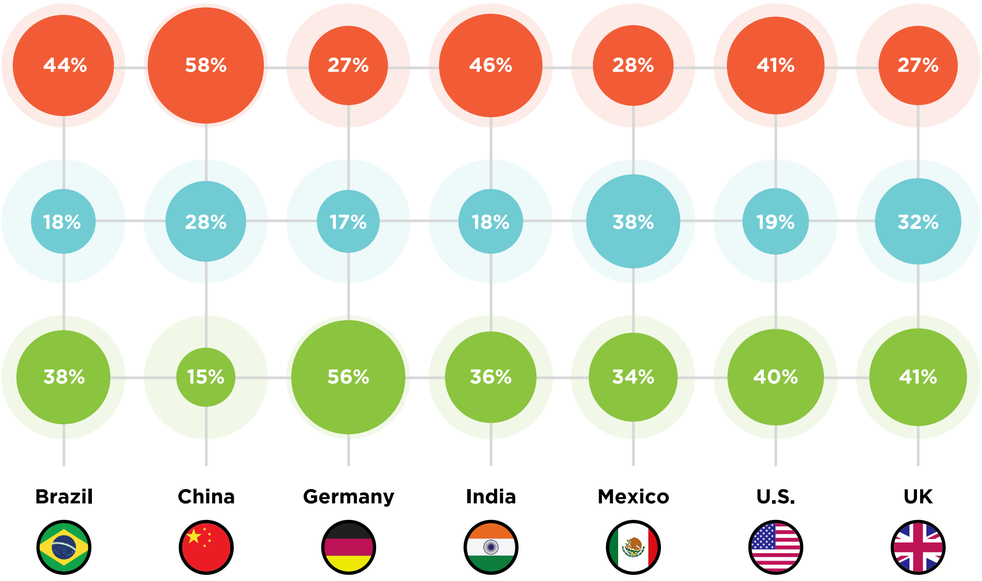


Question: When traveling or enjoying an experience I've purchased, I usually...
Source: GlobalWebIndex/ WPI Study March 2020
Base: 230 (Brazil), 238 (China), 188 (Germany), 259 (India), 248 (Mexico), 547 (U.S.), 605 (UK) respondents who have purchased airline tickets, hotel/lodging or experiences (e.g. a spa day, a cooking class, a craft workshop) in the last six months

SOME CONSUMERS GIVE IN TO #FOMO WHILE OTHERS CHOOSE TO DETOX

% of travelers across global markets who post a lot to social media vs. take a break from social media when traveling

- I post a lot of my experiences to social media
- Neutral
- I take a break from social media



BRAND IN ACTION: THE ISLANDS OF TAHITI

For years, the Islands of Tahiti had leaned on their overwater bungalows in marketing. Over time, other destinations began to copy this approach. The strategy for Worldwide Partners agency Mering was to lead with the warmth and beauty of the French Polynesian culture and their unique belief system known as Mana, a shift that broke through in this competitive category and drove significant, sustained visitation growth. "The strategy of leveraging the human element is, in fact, not new to us when it comes to destination marketing", notes Lori Bartle, President of Mering. "Our best, most successful work nearly always comes from understanding the unique, authentic, and desirous culture of a place, then leading with it to effectively differentiate and create demand.

Question: When on a trip or purchased experience, I usually..
Source: GlobalWebIndex/ WPI Study March 2020
Base: 230 (Brazil), 238 (China), 188 (Germany), 259 (India), 248 (Mexico), 547 (U.S.), 605 (UK) respondents who have purchased airline tickets, hotel/lodging or experiences (e.g. a spa day, a cooking class, a craft workshop) in the last six months

THE WORLDWIDE VIEW

IDENTIFY A CULTURAL ARTIFACT, AND LET THAT TELL THE STORY

Travel brings us closer to others by giving us a window into another culture – but the cultural globalization of modern times has washed away some of that. Identifying a unique, defining cultural artifact – like the Islands of Tahiti did with the French Polynesian belief system of Mana – immediately differentiates a destination from all of the other beautiful places to travel. Importantly, the Mana concept is rooted in human culture, beliefs, hopes, dreams, etc. – basic emotions that connect us to others.

ENCOURAGE EACH TRAVELER TO CHART THEIR OWN COURSE

"Off the beaten path" is a concept that increasingly resonates with travelers, especially those with higher income and those in mature markets. And it can be a key HX strategy because it appeals to the very thing that makes us human – our experiences are completely unique to us and our adventure is ours - and only ours – to determine. Facilitating choice and personalization when marketing a destination is key.

TECHNOLOGY HAS A ROLE, BUT SAFETY HAS A HUMAN FACE

Reinvigorating travel post-crisis will require brands to put safety at the forefront, both in terms of their practice and their marketing. Technology can facilitate this by providing contactless payments/tickets, sanitation solutions, and up-to-date information. But the way we communicate safety in travel and transportation has to be humanized.

> **"Understanding the psychology of travelers is going to be central to the recovery, as they now evaluate their choices in stark terms of their health and lives. Our research has shown it will be critical to balance concerns about safety with the quality of the traveler experience.**
>
> JUSTIN GILBERT
> VP, STRATEGY & INSIGHT
> R&R PARTNERS
> WORLDWIDE PARTNERS, U.S.

5. BUSINESS-TO-BUSINESS

For marketers, B2B has always been very distinct from B2C. But professionals are people, too. And, arguably, they are people *first*. As a more distributed and digital workforce comes into its own, employing HX strategies will be crucial for engagement and connection – and for differentiating your brand in the flood of webinars and videoconferencing that is coming to define our professional interactions.

> The marketing/sales experience is the first chance that prospects have to get to know us, and if our marketing doesn't reflect the fact that we understand, see, and hear them not just as their corporate title, but rather as an INDIVIDUAL HUMAN with a unique set of needs, then why would they choose to do business with us?
>
> **ANNE RYAN**
> **VICE PRESIDENT, DIRECTOR OF BRAND STRATEGY**
> **BROWNSTEIN GROUP**
> **WORLDWIDE PARTNERS, U.S.**

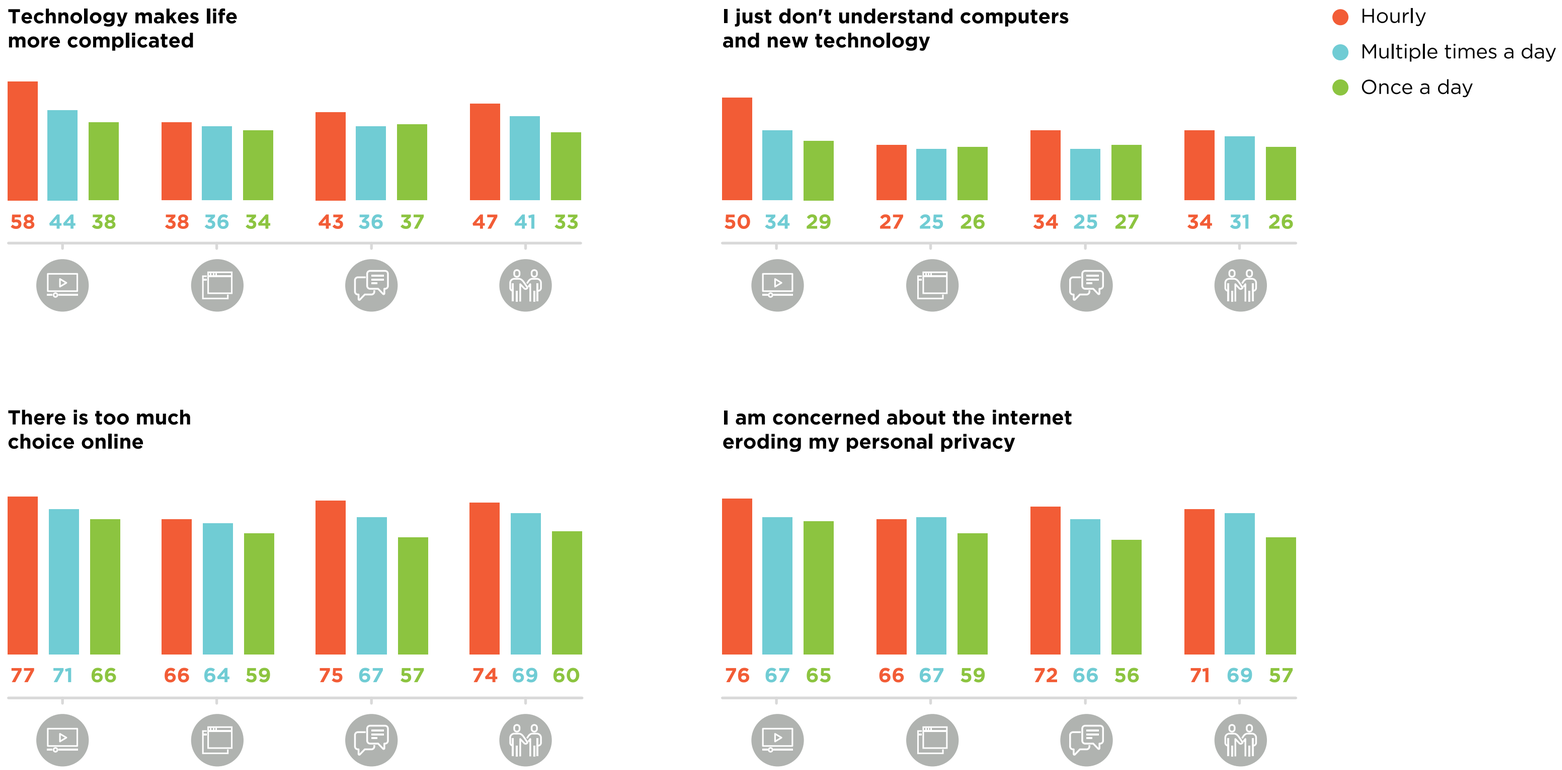
"TECH ANGST" IS NOT JUST A CONSUMER TERM

HX strategies can be especially effective in B2B marketing as a foil to the hyper-connectivity of the workplace. We're seeing similar tech angst among professionals as we do with consumers. And, the more connected people are in the workplace, the stronger this angst gets.

In our research of business professionals across 10 global markets, we've found that the more often people use a workplace technology during the day, the more likely they are to exhibit feelings of "tech angst". 58% of those who use video calling on an hourly basis, for example, agree with the statement that "technology makes life more complicated." This decreases to 44% among professionals who use video calling a few times a day, and further drops to 38% among those who only use it about once per day. The same pattern is evident across other software and tools.

MORE FREQUENT CONNECTIVITY AT WORK IS ASSOCIATED WITH STRONGER TECH ANGST

% of business professionals who agree with the following statements, based on their frequency of using common work/communication tools



Question: To what extent do you agree with the following statements?
Source: GlobalWebIndex Work 2019
Base: 17,000 business professionals across 10 global markets

DECISION-MAKERS GRAVITATE TOWARD BRANDS WITH HUMAN CONNECTIONS

Our data shows that professionals respond well to brands that appeal to their human nature and enable more personal connections. What's more, there is a clear indication that those who make the business decisions - and determine the budgets - are driving this demand.

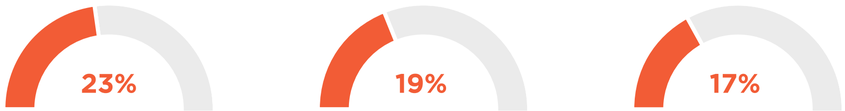
Among office staff, 17% would advocate for brands they have a one-to-one relationship with. This rises to 19% among management or supervisors, and peaks at 23% among senior or executive management. Appealing to key decision makers, therefore, means that brands and marketers need to nurture this human connection.

The one-to-one connection with brands increases in importance as companies grow in size, and as they grow in adoption to technology. Professionals working in large enterprise businesses are more likely to value this connection, as are those working for innovators and early adopter companies. Like consumers, it seems that the more entrenched in technology that professionals become, the more they value the human element.

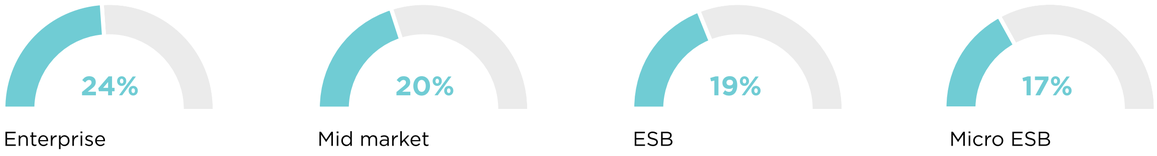
THE PERSONAL BRAND RELATIONSHIP IS IMPORTANT AMONG KEY B2B AUDIENCES

% of global business professionals who would be motivated to advocate for a brand because of a personal, one-on-one relationship with the brand

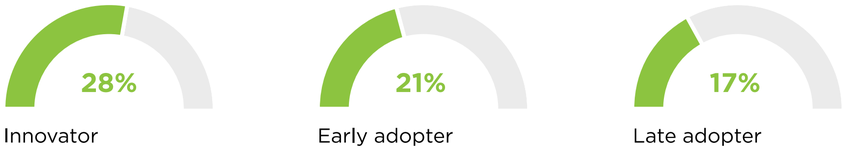
By employee seniority



By company size



By company's relationship with technology



Question: What would most motivate you to promote your favorite brand online?
Source: GlobalWebIndex Work 2019
Base: 17,000 business professionals across 10 global markets

THE WORLDWIDE VIEW

EMBRACE VIDEO, BUT IN THE RIGHT WAY

Video product demos hosted by salespeople offer a more humanized alternative to presentations or manuals, especially when the video allows a person's face and body to be captured. Investing in quality video tools to enable multiple angles and a high-definition stream enhances a video's representation of reality, as does going live over pre-recorded.

UNDERSTAND YOUR B2B CUSTOMERS' NEW REALITY WITH THEIR OWN CUSTOMERS

Perhaps the best way to humanize your B2B brand is to become a partner, not a seller. And partnership requires both commitment and understanding. With the current crisis, B2B marketers need to go one step beyond understanding their customers and look at how reality is changing for their customers' own user base. Empathy can go a LONG way.

> "Through it all, marketing and sales teams must incorporate a level of selflessness and empathy in their messages and approaches to connect in a human, authentic, and personalized way. As customers navigate life through this crisis, positioning your company as a true partner is critical. Dialing back product promotions and leading with a common understanding of our shared experiences during this time can be invaluable.

ALISON FETTERMAN
DIRECTOR OF STRATEGY
GODFREY
WORLDWIDE PARTNERS, U.S.

LOOKING FORWARD

Across a multitude of industries, we've seen the need to shift gears in how we market to consumers. Our reliance on technology has left us fatigued, and our human connections are more rare and valuable than ever before. As consumers increasingly demand human-first rather than tech-first experiences, brands and marketers need to react to avoid disconnect. We need a new way of thinking – to go from a standard of CX to an ethos of HX. A few guiding principles can help us move forward:

Individual struggles, triumphs, and adventures are the essence of our humanity. Each person's big picture is always shaped by little, unique details. Brands that give people the opportunity to live out their own story will rise above the pack.

Mature and emerging markets react differently to "human" messaging. More than ever, brands need to take a local approach to personal marketing.

Technology is most powerful as a stepping stone to real, human interaction. Trying to equate a one-for-one between real, live experiences and digital ones adds to our ever-present tech fatigue. The winning formula is to use technology to support human experiences.

The need to revitalize our marketing culture post-crisis is undeniable. But the need for something future-proof, beyond our current crisis, is essential. Embracing HX is to embrace much of what makes us human. And in an ever-changing world of technology, that is a precious thing.

METHODOLOGY

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64.** Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

For an **in-depth explanation of GlobalWebIndex's research and methodology**, including information on our country coverage, internet penetration rates, our sample structures, and much more, please click **here**.

SAMPLE SIZE BY MARKET

The data in this report is taken from a mix of GlobalWebIndex sources, with these sources clearly stated at the bottom of each chart. Much of this report draws on data from GlobalWebIndex's ongoing global research, which allows us to examine trending insights going as far back as 2011. Additionally, sections of this report also draw on the GlobalWebIndex Work dataset, which profiles the attitudes and behaviors of 17,000 business professionals across 10 global markets (U.S., UK, France, Germany, Spain, Singapore, Japan, India, Brazil, Australia).

To supplement these sources, we have referenced data from a number of bespoke studies in order to provide an exploratory lens on the HX topic for key markets. These include the following studies:

- A study on healthcare trends among 2,681 U.S. and 2,864 UK internet users conducted in October 2019
- A study on COVID-19 behaviors among 2,237 U.S and 1,585 UK internet users conducted in April 2020
- A multi-wave study on COVID-19 behaviors among 12,845 internet users across 13 global markets (Wave 1, March 2020), 15,079 internet uses across 17 markets (Wave 2, April 2020), and 15,275 internet users across 17 markets (Wave 3, April 2020)
- A study on travel and CPG attitudes among internet users aged 18-64 in Brazil (349), China (306), India (310), Germany (318), the U.S (967) and the UK (1,052)

OUR RESEARCH

As part of our ongoing global research, each year GlobalWebIndex interviews over 575,000 internet users aged 16-64 across 46 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the 'weight' of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

THE WORLD IS YOURS

ABOUT WORLDWIDE PARTNERS

Worldwide Partners, Inc. (WPI) is one of the largest and most-established networks of independent marketing services agencies in the world, comprised of 70 agencies in 40 countries across 5 continents.

WPI offers brand marketers a customized, multinational service platform built to ensure the effective implementation of global marketing principles within a local market context to optimize marketing efficiency and to maximize business return.

Many of the world's most heralded brands across 90 industry verticals gain access to best-in-class, entrepreneurially-driven agencies steeped in local knowledge in all markets where they engage WPI agencies.

With over $5 billion in capitalized billings, WPI agencies serve clients such as Heineken, Mitsubishi, Lufthansa, Brand USA, Las Vegas Convention and Visitors Authority, Pfizer, and 3M, to name just a few. Unlike the traditional agency holding company model, Worldwide Partners owns no agencies. Our agencies own the network.

Worldwide Partners agencies maintain their independence while operating within an interdependent framework engineered for seamless global collaboration.

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