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PROGRESS IN MOTION

**THE FUTURE OF BUSINESS:
4 WORLD-CHANGING TRENDS**

2021 — BRUSSELS

PROGRESS IN MOTION

Publicis Groupe wants to **shape progress** in this world - it's why we get out of bed in the morning. And we know that progress happens when you steer change in the **right direction**. That's why identifying and understanding how the world is changing matters so much to us.

We've identified **four mega-trends** that are impacting people and businesses around the world. These trends are occurring as we speak, and will keep on **growing and evolving** in the next couple of years. We believe that the ability of brands to embrace these changes in order to drive society forward will be tested.

The report you're about to read — or skim through (we know how people "read" reports) — thoroughly explores these four trends, to provide a **fresh outlook** on how they will translate at the **micro level**. So we can be ready to face the challenges ahead together.

Without further ado, here are the four trends that will radically change business.

Enjoy the read!

1.

CUSTOMER-CENTRICITY

Covid-19 has forever changed what customers expect from brand experiences. Touchpoints, especially digital ones, have multiplied and improved their quality. There's no going back now. It is no longer a matter of gaining competitive advantage. For businesses, customer-centricity is about survival.

2.

DATADATADATA

We are entering a polarizing era. On the one hand, data pragmatists are comfortable with exchanging personal details with brands in order to enjoy free services or personalized products. On the other hand, privacy-first consumers are reluctant to trust brands that cannot guarantee data security. There is a divide which keeps growing, with innovations on both sides.

3.

EMPATHIC BRANDS

The recent events have accelerated the urgency for companies to embrace a societal role. Brands are increasingly held accountable for their actions, and rewarded when promoting values such as diversity, inclusivity, well-being or transparency. There is a growing pressure on companies to empower (marginalized) consumers and to accept cynicism and criticism as forces that push them to be better.

4.

ENVIRONMENTAL CHALLENGES

Finally, environmental challenges. This issue has become extremely important for consumers and is already driving their purchase decisions. It is no longer enough to take a stand or make a statement. Claims by brands need to be supported by actual evidence. Proactive and innovative businesses lead the game by showing how they are one step ahead.

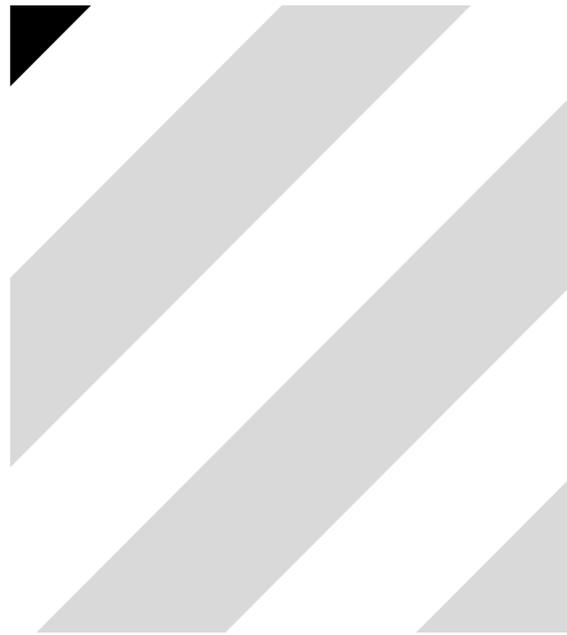


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TREND #1:

CUSTOMER-CENTRICITY



TREND #1: CUSTOMER-CENTRICITY

Consumer-centricity focuses on how people navigate between platforms and devices, between digital and physical. What we once saw as potential boundaries doesn't exist anymore, as everything is connected in order to improve daily life.

Consumers navigate between platforms and devices, between digital and physical. What we once saw as boundaries doesn't exist anymore (and hasn't for some time). Brands are expected to adapt to a consumer-centric world. Every experience - be it in-store or online, whenever, wherever - must be seamless. Consumers expect what's most convenient at every touchpoint.

Without technology, customer centricity would not be where it is today. It's one of the main drivers to push this trend forward. On the other hand, we need to be realistic. We once thought everything would happen with the help of your digital personal assistant, that is not yet the case.

Placing consumers at the heart of everything you do already was—and will continue to be the norm.



However, the pandemic that hit us has accelerated the move towards a more consumer-centric world — and will probably continue to do so in the near future. We saw 10.2% increase in online grocery shopping, and e-commerce grew by 8% in Belgium and 50% in the last 5 years (US + EU) with consumers expecting the same experience quality online as the one they know in-store.

Macro trends translate into the following micro trends

WHAT HAPPENS AT THE MICRO LEVEL



Social powered shopping

Social media becoming e-commerce platforms.



Experience-based retail

Retail focusing on experiences rather than sales.



From ownership to usership

We no longer own things, we use things.



Personalized touchpoints

New ways of interacting with people.



SOCIAL POWERED SHOPPING

Social media provide brands with new sales channels, allowing. Allowing people to shop whenever they see something they like.

30%

of consumers would shop on social media platforms like Facebook, Instagram, Twitter, or Snapchat

71%

Increasing popularity of in-app purchases : according to a global research by FIS, 71% of shoppers use mobile apps to make purchases, primarily driven by the desire for speed and simplicity.

70%

Customers trust user reviews more and more: around 70% of customers use social media to read authentic reviews before choosing a particular brand and making a purchase decisions.

Examples:

- Buying products directly from search engines: [Google \(Shopping\)](#)
- Built-in e-commerce platform: [Tik Tok, Instagram](#)
- Live e-commerce thanks to influencers who promote products on social media: [Taobao Live platform](#), [Livescale x Shopify](#), Amazon Live, Facebook & Instagram platforms, [KFC Pocket Stores x WeChat](#)

EXPERIENCE-BASED RETAIL

Retail spaces have become experiences, designed to seduce very specific target groups, from parents to youngsters. Often offering "fantasy, imagination and escape" through design, gamification, in-store digital touchpoints, coworking spaces, etc. Thus elevating the shopping experience to something memorable.

93%

of retailers think customers are more likely to spend money for brands they feel connected to

66%

of consumers think that valuing their time is the most important thing a company can do.

Some cool examples of 'stores' doing it right:

- [The Loong Swim Club in Suzhou \(China\)](#)
- Tribeca district (US)
- [Burberry Social Retail Store \(China\)](#)
- Virtual wardrobes with fantastical backdrops: [Xcommons x ICY](#), The Fabricant
- Temperature, classification of products, digital touchpoints: [Geox In-store](#)



[Starbucks Roastery](#) in NYC with an experience around "all things coffee" experience to reach a higher end of the market



[Farfetch's Augmented Retail Solution](#) linking the online and offline worlds through data & technology



[House of Vans](#) in London living up to the brands' concept "Off the Wall"



NY Camp & Showfield – experiential retailers

FROM OWNERSHIP TO USERSHIP

The way people shop is changing. Modern consumers have different priorities, and attitudes towards owning things are altering all together. The cultural shift towards usership instead of ownership is very real. Where we used to buy DVD's, CD's, bought cars, usership & subscription models takeover. Even in gaming there's a shift from buying games in-store towards entirely digital databases accessible at all times without owning any of their content.



53%

By 2022, 53% of all software revenue will be generated by subscription models

71%

Even the car subscription market is set to grow by 71% by 2022.

41%

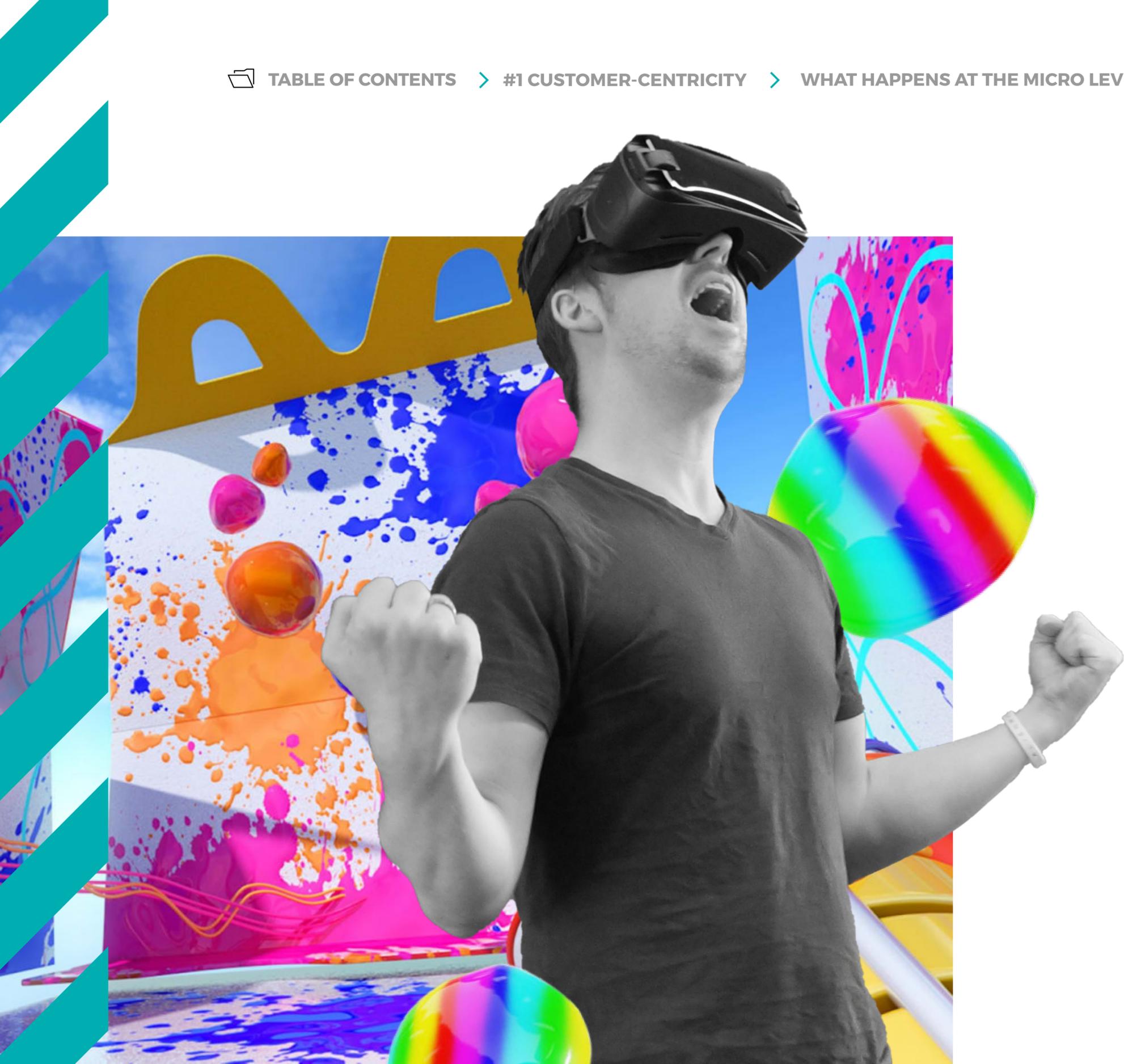
Today, 41% of households subscribe to one or several streaming music services

69%

of households now subscribe to one or several video streaming services

Examples:

- [Xbox Cloud Gaming](#)
- [RentTheRunway](#) - designer clothes rental.



PERSONALIZED TOUCHPOINTS

Brands are looking for new touchpoints to reach very specific audiences at specific moments. Thus creating added value for consumer while improving their products.

Examples:

- [VR : McDonald's McLoft](#)
- [Voice-based shopping](#): shopping for low-risk items, like ordering your usual Starbucks or Domino's
- Omnichannel experiences: [Sephora](#) connecting its app and stores (e.g.:make-over appointments via the app with access to all products used)
- In-store personalization: [Nike](#) (3D sneaker personalization); [M&M's](#)
- AI to better address customers' needs and improve personalization:
[Hilton Hotels](#) Uses AI Robot to Greet Guests; [Levi's](#) Creates Virtual Stylish

TREND #2:

DATA
DATA
DATA



TREND #2: DATADATADATA

DataDataData is all about the vital importance for brands to treat incoming data the right and secure way. Using it to improve people's experiences with brands and products.

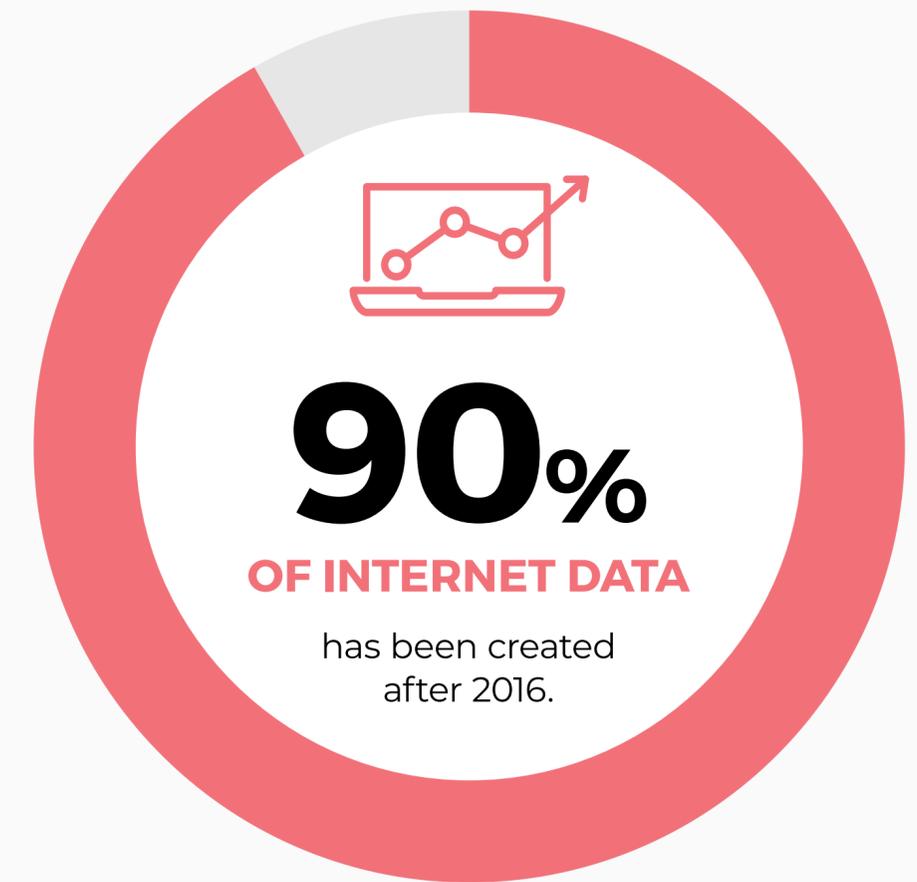
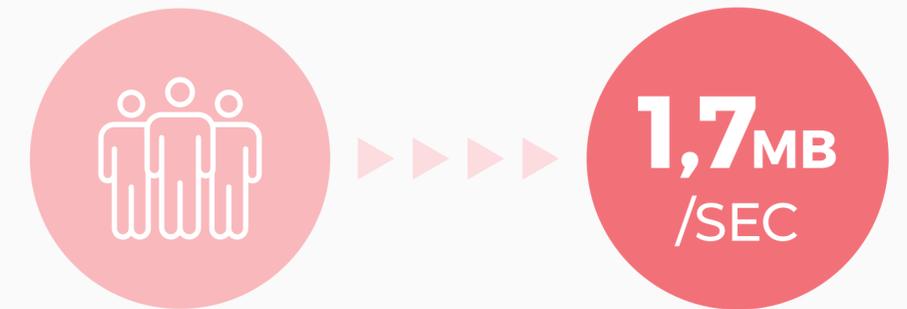
There is an abundance of data being shared, by people who know it, and by people who don't have a clue what data even is. DataDataData is all about the vital importance for brands to treat incoming data the right and in a secure way. People demand that whatever brands know about them stays, is in safe hands.

People have become data pragmatists, recognizing the value of their behavior-data and expecting added value in return. Data doesn't come free; people expect something in return.

A study published in the Journal of Consumer Policy found that participants would require (on average) 80 dollars per month in order to allow companies full access to their personal data.

Data has become transactional and this will only increase in the future. People expect the data they provide to be treated securely, but they also expected the right value for their worth.

In 2020, people created
1.7 MB of data every second.



Macro trends translate into the following micro trends.

WHAT HAPPENS AT THE MICRO LEVEL

Privacy sells



Privacy is becoming a USP for brands.

New payment methods



RIP cash.

Hyper-personalization



Consumer data can be used to create unique products

Tech based insurance



Insurance that uses data to predict behavior

Connected car insurance



Analyzing driver behavior to predict insurance needs

PRIVACY SELLS

Brands seem to now understand the importance of data privacy for consumers. It is a new selling proposition. Besides the transparency that consumers demand when it comes to companies collecting and using their data, more and more people are looking for products that will help protect their privacy. Apple's entire ecosystem is based on being 'unhackable', and even banks like KBC are proposing 'digital information vaults' to keep your details safe.

It's both transparency regarding what you will do with the data you receive and about offering solutions to protect data.

81%

of respondents feel as if they have little or no control over their data collected.

61%

of individuals who are active about privacy are under the age of 45, and among privacy-active respondents.

48%

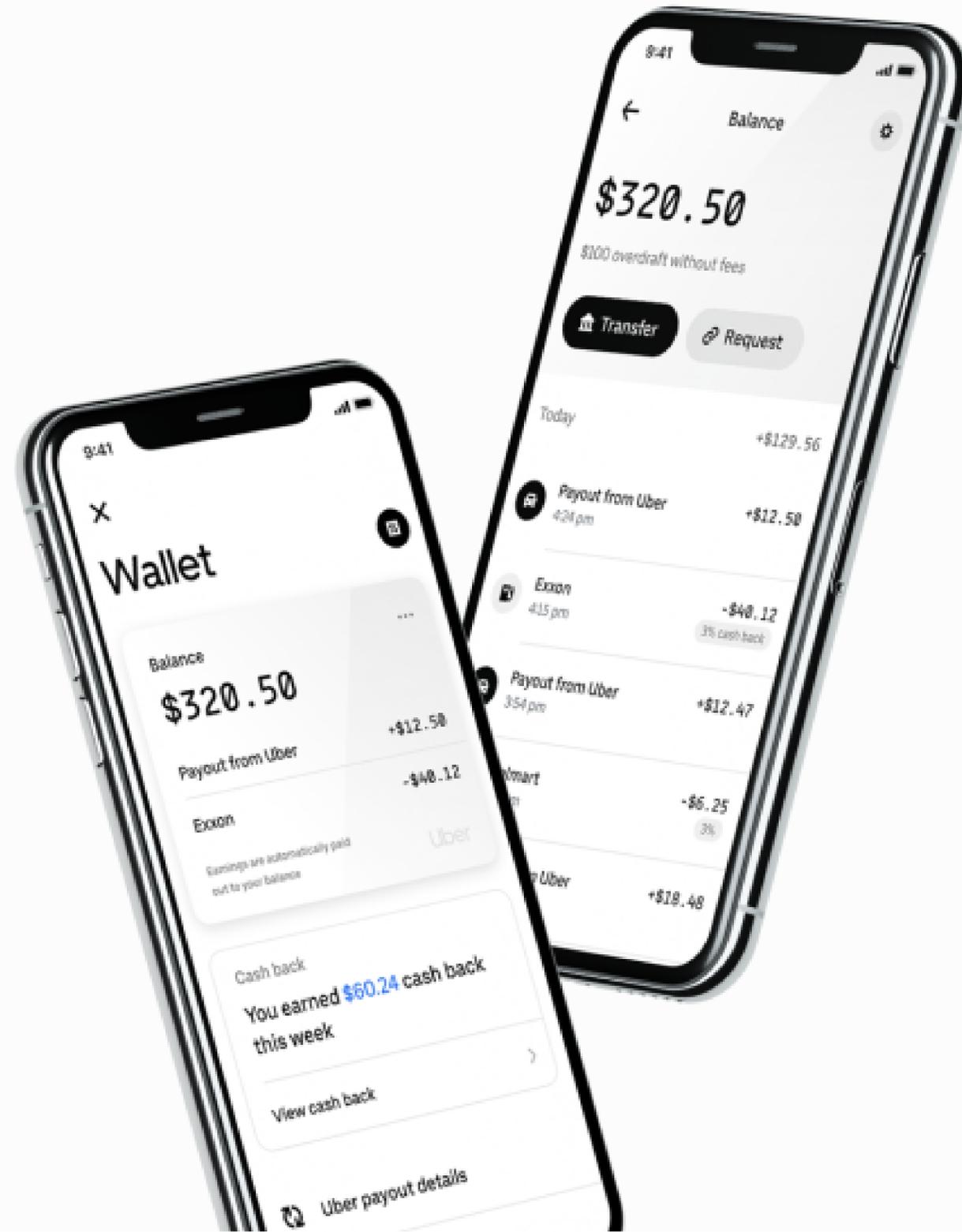
indicated they already left companies or providers because of data policies or data sharing practices.

Privacy. That's iPhone.



Examples:

- [Webcam blocker : KitKat](#)
- [Privacy. That's iPhone](#)



NEW PAYMENT METHODS

Payment has moved away from physical money and has become almost entirely digital. The next step is going beyond the very concept of a credit card.

Covid-19 has sped up the adoption of contactless payment in supermarkets, but it goes way further than this. We have witnessed the introduction of biometric payments, crypto-payments, gesture-based payments, facial recognition payments, etc - All of this is making payments easier and more diverse than ever.

Even branded payments have sprouted up in the past years. Branded money is a payment product and solution that connects brands with people. Spending branded money via of custom prepaid Visa/Mastercard cards, virtual payment cards, or other outboud payment methods helps you drive customer acquisition while enticing shoppers to try something new.

Examples:

- [Apple pay](#)
- [Uber Money](#)
- [Amazon Pay](#)

HYPER-PERSONALIZATION

Consumers expect brands to create unique offerings with the data they receive. They are willing to share certain datapoints to get offerings in return. Hoping that, if it's done right, both parties win.

80%

A report from Epsilon showed that **80%** of shoppers are more likely to buy from brands that offer personalized experiences.

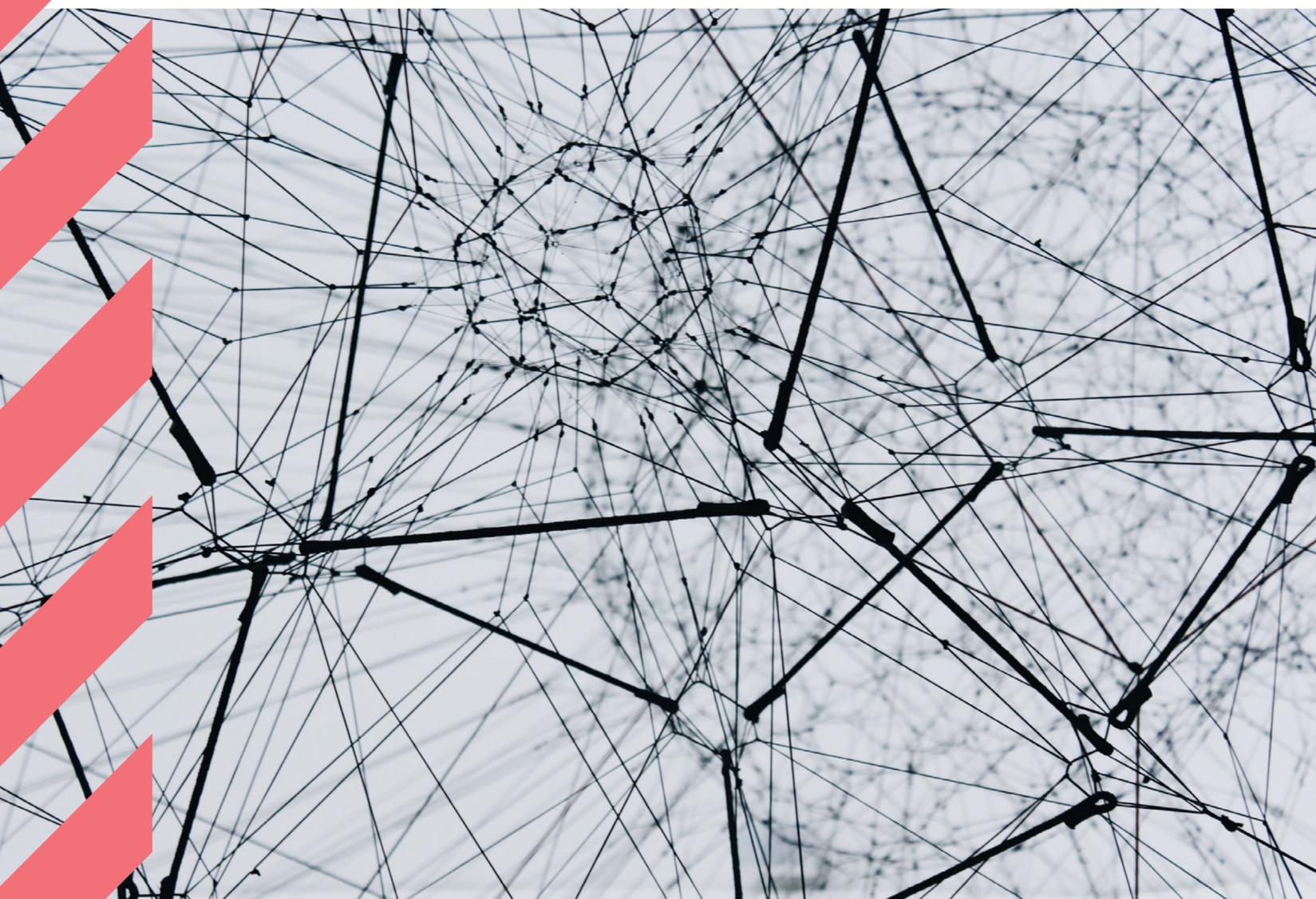
Examples:

- DNA-based skincare: data has allowed skincare to become personal; skincare can be DNA-based and entirely tailored to a specific person's skin type. Making it a unique, personally customized product. (ex. [Nomige](#))
- [Geneplanet](#) - DNA-based diets



TECH-BASED INSURANCE

Predictive analytics are used by many insurers to collect a variety of data to help them understand and predict customer behavior. However, there are new ways predictive analytics can be used to improve accuracy of data.



In 2021, insurance companies can use predictive analytics for:

Pricing and risk selection

Identifying customers at risk of cancellation

Identifying risk of fraud

Triaging of claims

Identifying outlier claims

Anticipating trends

CONNECTED CAR INSURANCE

Connected car insurance is a technology-driven automobile insurance leveraging the Internet of Things (IoT), whereby insurance premiums are dependent on driver behavior. Connected car insurance programs are designed to reward and promote safer and smarter driving behavior, while enabling auto insurance customers to receive potential discounts and savings their monthly premiums, based on individual driving patterns calculated by the insurer they chose.

Here are some of the unique bits of data that are being collected to help insurers assess driving habits:

1

Distance Traveled – basing premium on how much a consumer actually drives versus stated distance

2

Time of Day Driven – this is important, as people who drive mostly during the night are considered at a higher risk for accidents

3

Harsh Cornering – applying excessive force when maneuvering corners

4

Speed and more – the act of exceeding speed limits higher than what is safe or legal, and other unsafe maneuvers

5

Hard Acceleration or Braking – applying more force than what is normally required for a specific vehicle

TREND #3:

EMPATHIC BRANDS



TREND #3: EMPATHIC BRANDS

Brands fulfilling a societal role to try and make the world better.

People expect brands to take a stand together with them. Brands can no longer ignore what's going on in the world they must contribute positively to society. They must find their meaning and what they, alongside their consumers, want to represent. Brands must reflect on societal issues shaping society. It's about taking part of cultural movements, like Black Lives Matter, and pushing further. Not just taking a stand, but also acting accordingly. They need to constantly show real commitment.

Think of brands like Ben & Jerry's which has doing good at its core, Dove only portraying real women or a brand like Airbnb housing up to 20.000 Afghans in need for free.

Brands non-negligible role in shaping progress:



Brands can no longer ignore their role in shaping society, and they're reflecting how society should be, by emphasizing values such as diversity, kindness, compassion for others and oneself, or, more broadly, by showing their engagement regarding current societal concerns.



Macro trends translate into the following micro trends.

WHAT HAPPENS AT THE MICRO LEVEL



Mental health wealth

Importance of mental health taking center stage



Ultimate transparency

Nowhere left to hide.



Empowering people

Stronger together



Inclusivity for all

Be more inclusive

MENTAL HEALTH WEALTH

People are taking time to care for themselves: they care for self-care. Taking time off and buying products with only one goal in mind: to help them take a break. It's about putting oneself first for a change. Some much-needed self-care in an overly-saturated world.

Brands need to answer these cravings. New research shows that the pandemic has encouraged people to take mental health into their own hands. Nothing makes people as wealthy as good mental health.

Examples:

- Publicis Groupe providing all employees access to Headspace.
- Tech company [DigitalOcean](#) offering employees yoga sessions twice a week, sports leagues, fitness groups, and a \$100 monthly gym reimbursement
- [Nespresso's Pour-Over Style Carafe](#) to encourage consumers to relax and enjoy the moment
- [Apple Watch's "Breathe"](#) app, to promote relaxation and calm
- [EY with its "r u ok?" program](#), which includes one-on-one peer-counseling and a 24/7 helpline for Watch's employees.



ULTIMATE TRANSPARENCY

Retail brands realized the importance of communicating about transparency and ethics. Consumers are more sensitive to responsible consumption than before. This is why more brands communicate about processes, ingredients, really making it the star of the show.

Examples:

- [Panera Bread](#) – Uses a "transparent menu" listing calories, detailed ingredients and nutritional information for every item, along with animal welfare reports and positive impact reports
- [Patagonia](#) – Openly shares clothes fabrication processes.
- [Southwest Airlines](#) – With its "Transparency" marketing campaign in which customers are treated honestly and fares actually stay low
- [Knorr](#) – With a campaign focusing on product ingredients.
- [Delhaize](#) – Displaying products nutri score
- [People Tree's 'Our Blue Planet'](#) collection in partnership with BBC Earth to highlight the importance of oceans and marine conservation

INCLUSIVITY FOR ALL

Our society is moving towards a more inclusive future. Gender norms, families, social backgrounds It's all being questioned. Things are no longer what they used to be and as a brand, you need to embrace this.

Examples:

- [Victoria's Secret](#) ending its fashion show and replacing its angels with activists – a bit too late, but still.
- [MACLovesPride](#)'s campaign colors palette, [Adidas](#)' 'Pride Pack' collection
- [Lego](#)'s 'Everyone is Awesome' set
- [Nike](#)'s 'Pro Hijab' for Muslim women
- [Cover Girl](#) featuring a boy in it's equality campaign
- [Gucci Beauty](#) featuring disabled people
- [Microsoft](#)'s alternative controller, which included touchpads instead of buttons, and bright colors to help the visually impaired
- [Coca-Cola](#)'s 'Share a coke with...'





EMPOWERING PEOPLE

Brands that position themselves more as partners. It's about accompanying consumers and getting them further in life.

Examples:

- [Nike](#)'s campaign 'Better for it'
- [CoverGirl](#) #GIRLSCAN
- [Dove](#) #SPEAKBEAUTIFUL
- [Tommy Hilfiger](#) and 'Moving Forward Together'

TREND #4:

ENVIRONMENTAL CHALLENGES

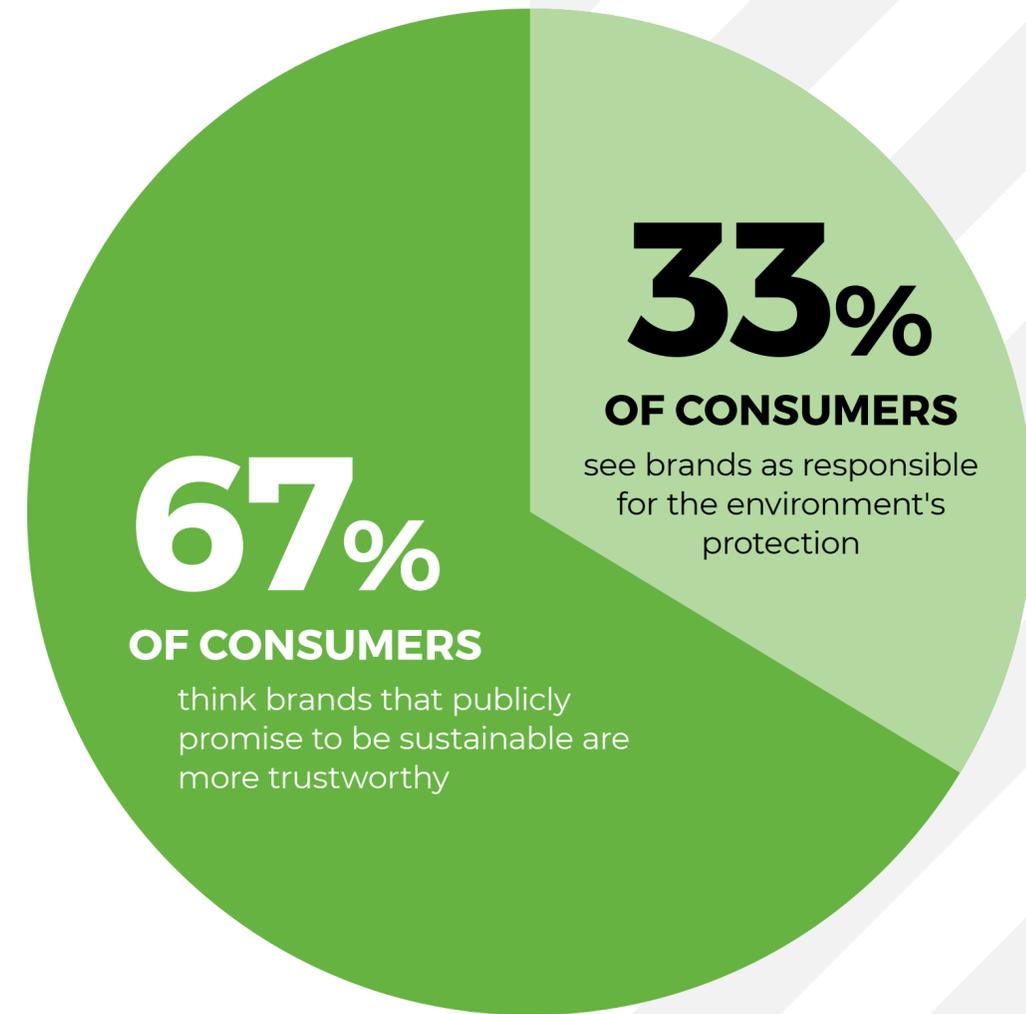


TREND #4: ENVIRONMENTAL CHALLENGES

Brands tackling environmental challenges for the better. Trying to do their part in what is considered the biggest challenge humanity has ever faced.

Humanity is faced with many challenges, but none comes even close to the environmental challenges currently before us. We used the Earth's natural resources too much for too long, and are now facing the consequences. People expect brands to act now, taking the lead and improving what used to be a common practice. All with sustainability and the preservation of the environment in mind.

The environmental challenges we face don't only affect how we do business now and in the future, but it also changes how people perceive you. Not acting is not an option anymore.



MACRO TRENDS TRANSLATE INTO THE FOLLOWING MICRO TRENDS.

WHAT HAPPENS AT THE MICRO LEVEL



Climate-based payments

Transactions that impact your carbon footprint



Plant-based alternatives

Replacing ingredients by plant-based alternatives



War on waste

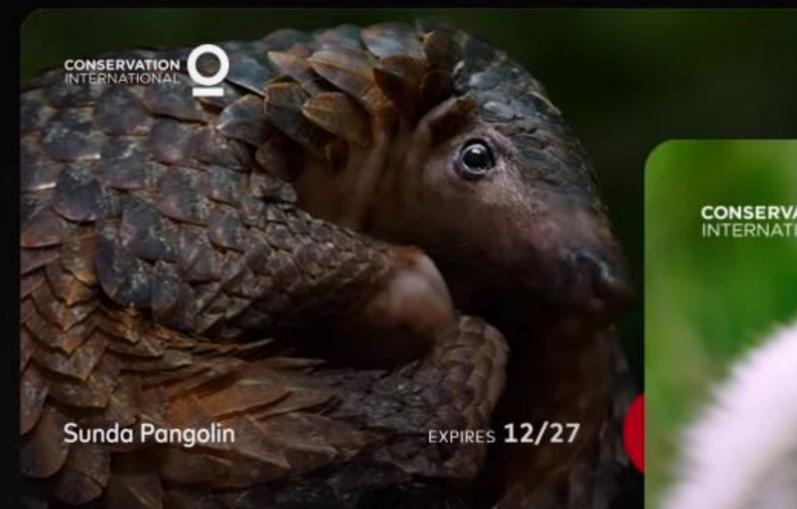
Bringing waste to the absolute minimum

CLIMATE-BASED PAYMENTS

Imagine a world where every transaction impacts your individual carbon footprint. This dream is becoming reality; as new systems are being implemented to heighten consumer awareness and shift from a sustainable mindset to an actionable mindset.

Examples:

- [Carbon credit](#)
- [Klarna](#) a tool to help track one's carbon footprint
- [Climate credit card](#)
- [Doconomy](#)
- [Mastercard](#) – Endangered species is, a card that lasts as long as one particular endangered species' predicted extinction date





PLANT-BASED ALTERNATIVES

We all know that some industries aren't very sustainable. So, we start looking for alternatives in nature, be it plant-based leather jackets, plant-based meats, insect-based food, and many more, we keep discovering nature's never ending stream of solutions.

Examples:

- [McDonalds](#) - McPlant range, in partnership with Beyond Meat
- [Burger King](#) - veggie nuggets
- [CoverGirl](#) - cruelty-free certification
- [Urban Decay](#)'s vegan Naked Palette
- Climate positive women's hygiene brands: [Dame](#)'s reusable tampon applicator, period underwear, menstrual cups, washable hygienic pads
- [Vegan leather clothing](#): cactus leather, vegetable ivory and vegan wool, leather from pineapple leaves and citrus waste
- [Bolt Threads x Stella McCartney](#) - prototype of Falabella bag using Mylo (plants and mushroom-based leather)



WAR ON WASTE

Consumers are challenging the throwaway culture. Waste is seen as something evil and needs to be prevented at all costs. Brands should work on prevention and finding alternative uses for waste. Be food waste going to those in need or asking consumers to bring in their old electronic and electric devices when buying new ones.

Across the EU, 88 million tons of food are wasted each year. This means that, on average, citizens of EU countries waste 173kg of food each. Belgians are the second worst offenders, wasting 345 kilos of food yearly. Only our Dutch neighbors are doing worse.

Examples:

- [Ikea's](#) Take Back Program
- [Gillette](#) and [UNIQLO](#) Recycling Program
- Purchase surplus food ([Too Good To Go](#))
- Circular shopping system ([Loop](#), [Taylor Stitch's](#) Restitch Program, [Depop](#) and [Vinted app](#))
- [Nike Hippiie Space](#) sneakers, made with recycled materials."
- [Google](#) - recycles and reuses 86% of its non-data center waste
- [Microsoft's](#) and [Google's](#) pledges to nullify their carbon footprint
- [South Korean law](#), where people pay fines for wood waste."



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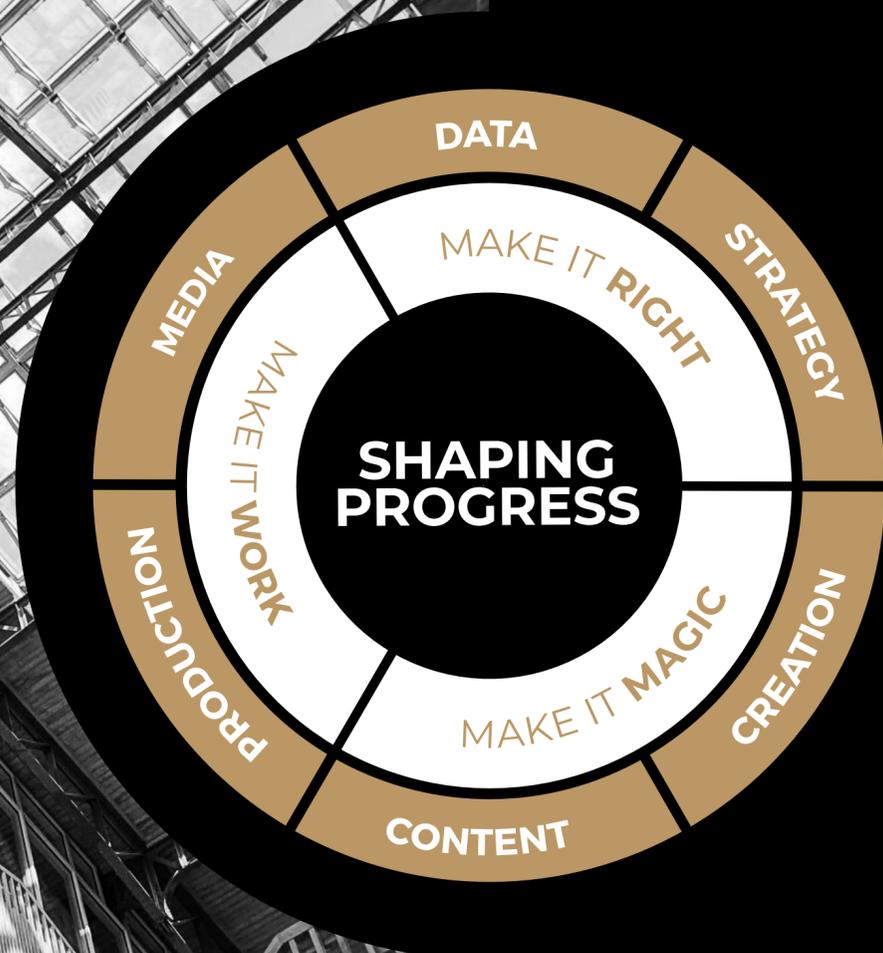
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WE SHAPE PROGRESS. WHAT ABOUT YOU?

Change is happening faster than ever. But it doesn't always bring us what's best. That's why we believe in shaping progress, powered by collective creativity. It means we transform change into real progress for brands, people, culture and society so that we can all play our role and take our responsibility in this world. Being a very diverse troop of creative experts gives us the power to steer change forward together with you. Because when complex change meets our collective creativity, progress emerges.



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