

# ZEIT GUIDE

Your Guide to What Matters In Our Constantly  
Changing Culture

2019 | HEALTHY BUSINESS, HEALTHY SELF

## **What Business And Cultural Leaders Say About ZEITGUIDE**

**“ZEITGUIDE is a powerful and provocative tool that promotes relevance in the most dynamic era of our time.”**

~ Bob Iger, CEO of The Walt Disney Company

**“ZEITGUIDE is the Human CliffsNotes.”**

~ Beth Comstock, Former Vice Chair GE

**“ZEITGUIDE is your go-to source to know anything quickly and comprehensively.”**

~ Linda Boff, CMO of GE

**“I rely on ZEITGUIDE for the speed and accuracy of the insights they deliver on our constantly changing culture.”**

~ Geoff Walker, CEO of KidKraft

**“ZEITGUIDE synthesizes information about our constantly changing world in a digestible and engaging format.”**

~ Pam Kaufman, Viacom/Nickelodeon  
President of Consumer Products

**“I have an advantage in every room.  
It’s called ZEITGUIDE.”**

~ Ross Martin, CEO of Blackbird

**“ZEITGUIDE is about understanding the things that matter, which so few people understand.”**

~ Gary Vaynerchuk, CEO of VaynerMedia

**"ZEITGUIDE is a window into our cultural soul. And in our business, there is nothing more important than being able to add insight to the reams of data that flood our senses."**

~ David Sable, Global CEO, VMLY&R

**"ZEITGUIDE always surprises me, always has something to teach me and keeps me smart."**

~ David Nevins, Chief Creative Officer at CBS and President of Showtime Networks

**"ZEITGUIDE tells me what's just around the corner. It's the first to answer those questions that are on the tip of every smart person's tongue, but nobody quite has the words for yet."**

~ Alexander Jutkowitz, CEO of Group SJR

**"ZEITGUIDE is relentless about staying at the bleeding edge of the conversation. A powerful tool for everyone at the mercy of the new velocity of change."**

~ Katia Beauchamp, CEO & Co-Founder of Birchbox

**"ZEITGUIDE always understands the heartbeat of what matters."**

~ Brian Grazer, Academy-and Emmy-Award Winning Producer and Author of "A Curious Mind"

# ZEITGUIDE

• 2019 CULTURAL ALMANAC •

• JANUARY 2019 •





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## FOUNDER'S NOTE

To the cultural and business leader of today, the accelerating speed of the world means more anxiety and pressure to keep up. In an instant, well-established businesses are finding themselves disrupted by new competitors. Trends can heat up, hit the mainstream and then dissipate in days.

Add to that the stress of what every person, no matter their position, is bombarded with on a daily basis. Cataclysms, whether from natural events or the worst of humanity, seem to occur with greater frequency. A stock market on the upswing for years is showing signs of instability, eliciting whispers of another coming recession. Technology intended to make us more connected has been used to foment greater divisions. All of this is occurring at a time when our trust and faith in leaders, both business and political, sinks lower by the day.

And that's where we want to begin 2019: considering the importance of your own well-being to operate a strong business as well as to effect wholesome change in the world. As you know, every January, we at ZEITGUIDE pick a theme that we believe will be predominant in our daily lives throughout the year ahead. **Our theme for 2019 is "Healthy Business; Healthy Self."** As you read these pages, be mindful of the importance of a healthy self to run a business that is robust and healthy, and how those things, in turn, can promote and spread healthy change in the world.

At ZEITGUIDE, we cover everything you need to look out for, not to make you more worried, but to make you better prepared. We do so because we believe that each of us, in our own way, can play a role in addressing these problems by being equipped with a better understanding of what they are.

And we also know that our ability to respond is only as great as how well we prepare ourselves mentally, physically and emotionally to be adaptive and receptive to change. Taking care of everything else, after all, can only happen after we take care of ourselves.

Keep Learning,

A stylized, handwritten signature in black ink, appearing to read 'BG' or similar initials, with a large loop at the end.

**Brad Grossman**

Founder & CEO, ZEITGUIDE

*This is the second year of our ZEITGUIDE Quarterly Cultural Almanac (it was produced annually from 2013-2017). The editions in April, July, and November will show you where we've gone since the preceding quarter and look ahead to the next one—and beyond. We look forward to continuing this theme, and the conversation around it, in the months ahead.*



# WORKPLACE



If there has been a central theme to most workplace coverage over the last several years, it's been exposing what makes for an unhealthy work environment. The #MeToo movement has been the most visible example as it pushed many industries to reconcile with bad behavior among their ranks, headlined by a number of high-profile executive departures. Light has been shed on **unsafe work conditions** (notably with unsafe conditions for Tesla's factory workers) as well as **inadequate compensation** (particularly with Amazon's warehouse workers). And workplace cultures, known for **employee burnout** or mental, **physical and emotional abuse** from superiors, have been called to task. Lastly, more and more attention continues focus on issues of fair treatment, whether having to do **with equal compensation for women** or hiring practices that exclude **minority candidates**.

Point being, if you don't know what an unhealthy workplace looks like by now, you haven't been paying attention.

Now, as we turn the page to 2019, we expect our focus will turn from who's doing it wrong to who's getting it right.

So, what defines a healthy, productive workplace in 2019?

WORKPLACE

## WHAT DEFINES A HEALTHY BUSINESS?

### *An Honest Workplace*

Netflix earned attention from a [Wall Street Journal investigation](#) that painted a picture of a spare-no-feelings culture, complete with its own lingo. For example, “**sun-shines**” are when an employee has to offer an apology or explanation in front of hundreds at the company, or when terminated employees are told they’re being let go—and why—in front of their colleagues. Bosses at a director level can see the salary of every employee at the company, and managers are encouraged to apply the “keeper test” by asking whether they would fight to keep a given employee. If not, according to the Netflix philosophy, they should let that person go.

This culture of extreme openness and honesty can be, as some former Netflixers have noted, cutthroat and demoralizing. But it's also been credited in helping to fuel the company's ascendant growth. The upshot for Netflix is it gets to quickly weed out those who don't fit into its culture.

"We realized that when we had the right people, the right focus and the right deadlines, people **operated pretty independently**," said Patty McCord, former chief talent officer at Netflix. "It was about adults. It was about them knowing what they were doing. It's about having people who are passionate about the work that [they] need to get done."

So, should your workplace adopt the same strategy of brutal honesty? Not necessarily. Not every company offers the same degree of competitive compensation and other perks that make it worthwhile to stick in such an intense atmosphere as Netflix. **But every company should insist on setting a culture and finding people who will thrive within it.**

"What will distinguish the most profitable companies from the rest in the coming year won't be whether they offer foosball or free food," writes Sue Shellenbarger in the Wall Street Journal. "It will be whether leaders foster a workplace culture **where employees feel a sense of belonging**, like their jobs and trust their managers to help them move on to a better one."

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## WORKPLACE

## HEALTHY LEADERS

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Bold, aggressive and unwaveringly confident have long been the hallmark traits of CEOs. But facing intense scrutiny from the media, the public and investors in 2018, many companies have found themselves needing to recast their CEOs in a softer, more approachable light.

Think of today's most visible CEOs: Mark Zuckerberg (Facebook), Sundar Pichai (Google), Elon Musk (Tesla), Evan Spiegel (Snapchat) and Jeff Bezos (Amazon). "These CEOs got to where they are by largely ignoring their detractors ... That approach won't fly when the world is angry and [scared about the impact of your creations](#)," writes Jessica Lessin in *The Information*.

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WORKPLACE

## **ZEITBITES**

### *Is the Gender Pay Gap Worse Than We Thought?*

A popularly cited figure on the gender pay gap says that women make 80 cents for every dollar men earn. That figure is based on comparisons of what men and women earn for a year of full-time work. Taking a longer-range view, however, reveals this pay gap is much worse.

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# TECHNOLOGY



As we sum up the impacts of digital technology on our work, our social lives, our families and our health, we're increasingly left to wonder: **Has any of this been good for us?**

Seamless communication promised to help us work faster, save us time and make it possible to work from anywhere. Now, we simply have more work, have less—if any—time away from it and our commutes have only grown longer.

The ability to instantaneously connect to anyone at any time should bring the world closer, make it easier to access the best information and keep us connected to those we care about. Now, we see a world that is as divided as ever, where false information is proliferating, and we've become more socially disconnected from one another.

The good news? We at least are now more aware of these negative impacts, and can start to take more proactive steps to address them. Increasingly, **people are focusing on their digital hygiene**, using their new familiarity with technology's impacts to live healthier lives.

And we're also getting more advances that promise to help us be healthier, but that also raise their own set of questions about the privacy of our most intimate health information.

So, what's the tech we can feel good about it? Which companies can we trust? Here's what we're seeing for the year ahead.

## TECHNOLOGY

# CHECKING VITALS FOR THE BIG FIVE

Increasingly, the digital lives we lead fall under the purview of a select handful of companies: **Microsoft, Apple, Google, Amazon and Facebook, or the Big Five for short.**

“Much as people are now wary or even unhappy with the outsized power held by Facebook, Google, Amazon, etc., they are simultaneously **quite dependent on the services they provide,**” says David Autor, an economist at the Massachusetts Institute of Technology.

While there’s great variance to how we might feel about each of these companies individually, taken together, this trend of greater digital hegemony is not encouraging.

On the Recode Decode podcast with Kara Swisher, author Franklin Foer lays out the danger of the concentrated power of these companies in plain terms. “**They know our weaknesses**, and they know the things that give us pleasure and the things that cause us anxiety and anger. They use that information in order to keep us addicted. That makes these companies the enemies of independent thought.”

Which is to say, in the worst-case scenario, these companies are actively bad for us. The best case? That **the Big Five might start to correct what ails them, and by extension forge healthier relationships with consumers.**

Here’s what we’re seeing from the Big Five, both for the state of their businesses and their relationships with consumers.

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## TECHNOLOGY

# WELCOME TO SILICON PRAIRIE

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One of the ironies of the digital revolution is that, while it has enabled many to work from anywhere, it has also led to high-paying, in-demand jobs consolidating in a few select locales, such as the Bay Area, New York and Seattle. That's meant booming economies and sky-high cost-of-living for those areas. If it were a country, California's Bay Area on its own would constitute the world's 19th largest economy, greater than that of either [Switzerland](#) or [Saudi Arabia](#).

It's also home to the nation's most expensive real estate. The high costs of housing, particularly in the Bay Area, has forced many young Californians to move—to Austin, New Orleans, Kansas City, Pittsburgh, Philadelphia, Portland, Chicago, Denver and elsewhere—to [find lower costs of living](#) or

opportunities beyond the tech world. And those who stay are finding they have to live farther from job centers to find affordable housing. Americans in general increasingly live farther from where they work, with the average commute now topping 27 minutes each way. And high housing costs are tied to another troubling trend: the rise in homelessness in our most well-off cities.

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## TECHNOLOGY

**ZEITBITES***Walls Come Tumbling Down*

Despite taking a jab at its competitors' security failings at CES, Apple also announced a move that will make its own ecosystem more open and available (and possibly hackable). Apple's iTunes will now be supported in TVs from Samsung, LG, Vizio and Sony, without any additional hardware from Apple.

"The barriers that once separated products into little vertical silos appear to be crumbling. One might almost say that tech is having a 'tear down this wall' moment," writes Navneet Alang in *The Week*.

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# CONSUMERS



We've examined the focus we will see on creating healthier workplaces and healthier relationships with the technology we use in 2019. Continuing that theme, expect plenty of businesses to try and deepen their connection to consumers this year by promising to help them reach their personal health goals.

Mergers and acquisitions among large businesses will remain necessary actions for legacy firms to take in order to keep up with the tech giants. But this continued consolidation could pose trouble for how healthy the competitive landscape—and consumer choice—will remain. Can new names from the startup landscape rise up to challenge the growing hegemony of these superfirms and Big Tech? Or will newly emerging consumer categories be quickly brought under the purview of a few select, well-known names?

CONSUMERS

## **THE AMAZON PANDEMIC**

Odds are you have a few people in your life with unhealthy Amazon shopping habits. And who can blame them? Anything you could ever need is a click away and ready to come to your doorstep, sometimes in a matter of hours.

The variety of products on Amazon owes to the titan's e-commerce dominance that compels brands to work with the site. But **more and more, brands are starting to question this relationship and consider life without the retail giant.**

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## CONSUMERS

# BIG BUSINESS GETS EVEN BIGGER

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Big business is getting even bigger. Between the digital hegemony of Big Tech and the growing concentration of legacy firms owing to acquisitions in the media, retail and finance worlds, **more and more of the money consumers are spending is going to a shrinking number of businesses.**

A report by the Open Markets Institute delved into this issue by comparing **market share of the largest companies** in a range of industries in the early 2000s to today. From smartphones (98 percent market share) to peanut butter (92 percent), almost every industry has seen the largest firms snatch up a bigger piece of that pie.

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## CONSUMERS

**ZEITBITES***Reexamining Cannabis*

2018 was a landmark year for weed legalization. California legalized its recreational use last January, as did Canada in October. Deep-red Oklahoma and the famously not permissive Utah both passed laws allowing limited use of medical marijuana. Overall, the legal cannabis industry counted around **\$10.4 billion in revenue** in 2018.

But we're still learning about the full impacts of cannabis.

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## GLOBE & SOCIETY



Geopolitical intrigue. Climate catastrophes. Economic warning signs. There's a lot about the state of the world that should have us concerned for our physical and financial health. And that's before saying anything of the strain the news cycle puts on our mental well-being.

It's all so overwhelming that it can be tempting to want to close ourselves off from it all. What good can it do us, after all, to be constantly worried about the state of the world?

But from our viewpoint, the only way forward is to embrace the reality we find ourselves in. That's why we try to hone in on the most critical global and societal issues for you to track, to help ground us in an honest assessment of the way things are. Once we reconcile with that, we can start to imagine the way things might be.

GLOBE &amp; SOCIETY

## CALLING A TRUCE?

In diagnosing the health of the global economy, we first start with the state of relations between the world's two largest economies: the United States and China. As of now, a temporary cease-fire has been implemented in the U.S.-China trade war. The two sides agreed not to impose additional tariffs until March 1st, 2019 to allow time for further discussions. So, is this grace period a sign of cooler heads prevailing, or a temporary salve before greater escalation?

**"2019 is the year we are going to find out whether or not this is just a trade war, the beginning of a cold war, or worse,"** Shaun Rein, head of the China Market Research Group, told CBS News.

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GLOBE & SOCIETY

## CLIMATE CHANGE FIXES

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A healthy environment spells better things for all nations. But an unhealthy one? That spells all bad news. In the U.S., California's deadly wildfires (the deadliest in its history) underscored the threat of natural cataclysms spurred by global warming. Globally, increasing incidences of droughts, crop failures and loss of natural resources are playing a significant role in elevating conflicts. A peer-reviewed study published in the journal *Global Environmental Change* in January of this year found that worsening climate conditions were a significant factor in the rising numbers of people [fleeing conflict in the Middle East](#).

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## GLOBE &amp; SOCIETY

**ZEITBITES***The Next Front: 5G*

We've been tracking the status of the next big upgrade to the world's cellular network, 5G. One hundred times faster than 4G, the transformative effect of 5G will enable seamless interaction between devices—the idea at the heart of the Internet of Things—with the evolution from humans commanding devices to devices communicating with one another on their own. In the U.S., AT&T, Verizon and Sprint will each offer 5G speeds in limited cities at some point in 2019. Smartphones built to handle the network should be on the way by the middle of the year.

In the meantime, China's leading telecommunications company, Huawei, has been moving ahead with building [5G-capable networks across the globe](#), raising security concerns among U.S. officials due to the close ties between Huawei and the Chinese government.

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And thank you especially to you, our readers, who support us in continuing to do this work we love.

Keep learning,  
Brad Grossman  
CEO & Founder, ZEITGUIDE



## **ABOUT ZEITGUIDE**

ZEITGUIDE is your guide to the zeitgeist, German for "spirit of the times": The go-to source business and creative leaders rely on to stay smart, culturally relevant and ahead of the future. We keep you up to speed on the constant shifts impacting your business and lead you towards what's next. Contact us at [info@zeitguide.com](mailto:info@zeitguide.com) if you would like us to produce learning programs and content customized to your needs. Learn more at [www.zeitguide.com](http://www.zeitguide.com).