



# Research Brief

August 2019

## Drivers of Change

**Summaries of 50 Key Trends Identified by ASAE ForesightWorks**

### WHAT ARE DRIVERS OF CHANGE?

Even though we know change is coming, how often are we able to establish routines of scanning for changes that will affect our lives and our work? How can we identify and prioritize the changes we need to respond to now and in the future?

New research from the ASAE Foundation seeks to help association leaders tackle that challenge. As part of the ASAE ForesightWorks initiative, researchers from Signature i and Foresight Alliance winnowed down 300+ identified trends to 50 drivers of change that are particularly relevant at this time to the challenges association leaders will face in the future.

These drivers of change capture a range of trends related to how associations work and the communities they serve. Many of them have relevance to a range of industries and professions, or even to society as a whole.

The summaries on the next pages broadly capture the themes of and potential challenges resulting from these drivers of change. Forthcoming research products from ASAE will dive more deeply into each driver of change to provide actionable guidance and next steps for the association community.

**THE ASAE FORESIGHTWORKS DRIVERS OF CHANGE (AUGUST 2019)**

Aging World	More Human Humans
Algorithmic Politics	New Forms of Work
American Inequality	New Journal Models
Anticipatory Intelligence	The Next-Gen Professionals
Automating Work	Nichification: Big Data Segmentation
Bifurcated Workforce	Personalized Artificial Intelligence
Blockchain Platforms	Philanthropy Reshaped
Cartel Capitalism	Population Health
Climate Change Resiliency	The Productivity Paradox
Declining Trust	Rejection of Expertise
Diversity and Inclusion	Re-Working Career Pathways
Empowered Women	Reputation by the Numbers
Empowering the New Workforce	The Sharing Economy
Ethical Consumption	A Shifting Environment for Content
Ethical Edge of Innovation	Shifting Terrain for Advocacy
Fast Data	Socializing Reshaped
Fraying Cybersecurity	The Splintered Society
Global Power Shifts	Standards Under Pressure
Healthcare Disruption	Taming Big Tech Dependency
Higher Education 3.0	Toward a Spectrum of Abilities
Human-Machine Cooperation	Trade in Transition
Immigration-Driven Demography	Transparent Organizational Ethics
Marketing and Advertising Transformation	Virtualized Meetings
Mentoring 2.0	Volunteering
Microlearning	Who Owns the Data?

## SUMMARIES OF THE DRIVERS OF CHANGE

### Aging World

Most of the world's societies are aging, with the shares of elderly poised to rise steeply in both the advanced economies and most emerging economies. This could reshape political, financial, and social priorities as countries grapple with issues related to aging populations, such as rising dependency ratios, retirement and the workforce, and costs of caring for older citizens. These issues will play out for associations in areas such as workforce and benefits.

### Algorithmic Politics

The power of algorithms to influence politics—shaping the way information flows, manipulating individuals, and even participating as bots—is increasing. There is growing public concern that the same internet algorithms that customize content and personalize online interactions can enable tech companies to imperceptibly filter information, alter and focus attention, and provide conduits for messaging micro-demographic niches.

### American Inequality

Inequality in America is growing worse, though there are scattered signs of progress. Since the 1970s, income inequality and the share of wealth in the hands of the most advantaged 1 percent of Americans have been rising, though poverty has declined. Americans face a widening opportunity gap as a function of socioeconomic status, as well as significant racial, ethnic, and socioeconomic gaps in primary, secondary, and postsecondary education—though some of these gaps are shrinking.

### Anticipatory Intelligence

Big data, data analytics, and artificial intelligence are enabling predictive analytics used to

anticipate needs, opportunities, and threats in an organization's environment. The market for predictive analytics is growing rapidly, and major computing companies are key players.

Organizations view predictive analytics as one of the most important ways to leverage big data.

### Automating Work

Machine learning, innovative robotics, data analytics, and affective computing mean that growing swaths of work are potentially automatable. The impacts of automation on work and workers will vary substantially by industry, occupation, and even workplace—but it could transform most kinds of work and affect workers at every level including senior management. Associations' members and their own workforces will increasingly be affected by automation.

### Bifurcated Workforce

Trends may create two classes of American workers: mission-critical players who move the organization forward, and foot-soldiers who do the basic work. The latter are regarded by employers as relatively disposable, with lower prestige and pay. Such a two-tiered workforce is not assured, but it is being driven by deep structural forces including the expansion of gig and freelance work and the rising inequality of opportunity for workers.

### Blockchain Platforms

Blockchain technology uses a distributed digital ledger to record data, contracts, and transactions, financial and otherwise, without the need for third-party validation. While bitcoin was the first proof-of-concept for the efficacy of blockchains, blockchains have applications beyond virtual currencies. By embedding trust in the algorithms of the blockchain, blockchains can enable trustless transactions and data exchanges, eliminating the

need for supervision by intermediaries or government authorities.

### **Cartel Capitalism**

Mergers and acquisitions have caused a growing number of industries to be dominated by a smaller number of companies, while in the tech industry, network effects have led to the dominance of firms like Apple, Amazon, and Google. While these firms benefit from economies of scale that cut costs, their dominance can reduce competitiveness and economic dynamism. Additionally, by attracting the best talent, these world-beating firms capture a disproportionate share of productivity growth, contributing to stagnation in the rest of the economy.

### **Climate Change Resiliency**

The climate change debate is shifting away from large-scale national and international solutions toward practical, smaller-scale actions aligned with particular geographies or industries. Businesses and organizations are exploring ways to mitigate their environmental impact and build their resilience against risks such as business disruption and loss of public support.

### **Declining Trust**

In the United States, trust in institutions—including government, media, science, and medicine—is falling, with important social, political, and economic implications. This decline in trust could fuel deeper political polarization and further erode social cohesion.

### **Diversity and Inclusion**

American society and workplaces will continue to grow more diverse and inclusive as values evolve and younger generations increase their share in the demographic mix. This will occur against a backdrop of social, political, and racial polarization—and the workplace will be a

primary arena in which contending views collide and issues are worked out. To meet these challenges, inclusion efforts will be supported by a new generation of tools and processes.

### **Empowered Women**

In many countries, changing workplace needs, women's educational advances, and the reduction of discrimination are resulting in more women at the top of their professions. Associations have a unique and important role to play in promoting women in the workplace and making their presence visible. Gender equity discussions are important considerations in policy decisions and external communication.

### **Empowering the New Workforce**

New structures are emerging to support workers' rights and protections in the face of economic change. Workers are confronting challenges from two directions: deep structural changes—automation, the gig economy, and broader economic trends—that are shifting the balance of power in favor of employers, and the decline of unions and other traditional protections. Now, driven by innovative startups, a handful of political initiatives, and workers themselves, new solutions are emerging—including from associations, which can both contribute to and benefit from this movement.

### **Ethical Consumption**

Younger U.S. consumers are engaging in more “ethical” and values-driven spending on products and services, and investing in companies seen as doing good. The values and demographic weight of the Millennial generation suggest that this trend will grow.

### **Ethical Edge of Innovation**

Fast-moving technological innovation is outpacing the legal and regulatory structures

designed to protect public safety, promote business and trade, and foster ethical practices. While new technologies often roll out ahead of laws, in the coming decade the public pressure to curb unintended consequences will intensify.

### **Fast Data**

The drive to leverage big data will lead to more data gathering and more effective use of existing data. An increasingly important form of data analytics is “fast data,” which emphasizes real-time decision making based on the idea that the greatest value from data comes from immediate application. Examples include fraud detection, recommendation engines, personalization, and real-time demand forecasting. In all of these cases, the value is dependent on quickly processing and acting on the data—and this value can diminish quickly as the data get stale.

### **Fraying Cybersecurity**

Risks to digital infrastructures are growing, even as dependence on them rises. Employees are both worried and harried—concerned about digital privacy and security in the workplace, and tired of the difficulty and complexity of maintaining system security. Associations face the same internal risks as other organizations but also have opportunities to support their members in new ways.

### **Global Power Shifts**

Existing global power structures are breaking down, as new centers arise and power diffuses. Power is shifting among nation-states and flowing to several kinds of trans-national and sub-national organizations and groups. This will change the operating environment for associations, especially those with cross-border reach.

### **Healthcare Disruption**

New players will inject a dose of capitalism into American healthcare, shifting healthcare to a more retail-like experience. American healthcare delivery will be further unbundled and disintermediated due to non-traditional actors and businesses moving into the healthcare delivery space, as well as to growing use of technology that liberates care from hospital and clinic settings to care anywhere.

### **Higher Education 3.0**

Traditional educational models are under tremendous pressure as changes in work, technology, and student expectations demand both new curricula and new modes of instruction. Higher education is facing new threats of disintermediation by online education and alternative credentialing systems. While the knowledge economy places a premium on analysis and thinking, it is also creating new alternatives to the university that threaten to transform how students receive postsecondary instruction.

### **Human-Machine Cooperation**

Though many forecasts include substantial job losses due to automation—and such losses are indeed already occurring—many jobs will rely on cooperation between humans and machines. While less disruptive than total automation, human-machine cooperation will be a massive shift, with entire work processes becoming machine-oriented and humans learning to complement automation’s role.

### **Immigration-Driven Demography**

Immigration has become the central driver of American population growth—and will reshape not only demographics but also values and attitudes in the decades ahead. For associations,

this will result in a more diverse membership with new ideas, expectations, and needs.

### **Marketing and Advertising Transformation**

Advertisers and marketers are exploring innovative ways to connect with the public. Online advertising is growing, but concern is rising about vulnerabilities to abuse for other purposes, including fraud, as well as whether the model is even effective. Meanwhile, innovations in marketing and advertising are reshaping practices and assumptions by blurring the lines between marketing, entertainment, advertising, and content.

### **Mentoring 2.0**

Mentoring, even as it takes new forms, remains a central way to share organizational knowledge. Millennials are especially enthusiastic about using mentoring as a path to learning. Increasingly, technical advances are affording the opportunity to make more informed mentoring assignments and to use mentoring to capture institutional wisdom.

### **Microlearning**

Workers will need to continually learn, but many want small, specific bursts of information tied to immediate job demands, available at a time of their choosing. New media forms will enable modules that are small, timely, and focused. Certification will need to change to allow microlearning modules to be assembled in innovative combinations for new forms of certification.

### **More Human Humans**

Automation will steadily increase the relative value of certain human qualities in work, including social skills and creativity. In the age of artificial intelligence, humans will remain relevant not by knowing but by thinking,

listening, relating, and collaborating at the highest level.

### **New Forms of Work**

Freelance, gig, contract, and temporary work and the infrastructure to support them (e.g., online platforms and reputation systems) are growing. The number of independent professionals is expanding, and networked organizations rely on them. Associations will have new opportunities to serve these workers and advocate for their interests.

### **New Journal Models**

The traditional model of academic publishing is facing disintermediation by new, technology-enabled forms of scholarly communication. Open-access journals, preprint archives, and research data aggregators make it increasingly easy for researchers to bypass traditional publishing. Both traditional and non-traditional journals need to develop sustainable business models and rethink how to maintain editorial quality standards in a changing publishing environment.

### **The Next-Gen Professionals**

Millennials are now the largest generational cohort in the workforce, and generation Z is right behind them. These next-gen professionals are the future of associations and, contrary to some conventional wisdom, they are willing to both join and stay with organizations that meet their career development needs. Organizations will need to provide the kinds of training, mentoring, content, and other services that next-gen professionals value most, encouraging engagement that leads to loyalty.

### **Nichification: Big Data Segmentation**

The big data revolution makes it feasible to define new niche demographic segments that share common motivations and interests and to target

them with tailored and tested appeals. Associations will be able to communicate to and even predict the interests of very specific segments but will run the risk of limiting broader audience awareness of content and messaging.

### **Personalized Artificial Intelligence**

Rapidly advancing machine learning is combining with data analysis to enable software equipped with increasingly accurate pictures of consumers' lives and likes. This technology can support personalized microtargeting and allow organizations to offload customer service work to chatbots and other interfaces. Individuals may interact more and more with software that seems to know and understand them, sometimes better than their friends.

### **Philanthropy Reshaped**

Demographic and political changes, loss of trust in institutions, and the growth of donor-advised funds and impact investing will drive shifts in the channels, targets, and geographic focus of American philanthropy. These shifts will offer opportunities for associations to access new resources, engage new members, and create new partnerships.

### **Population Health**

The concept of population health is reshaping approaches to health in the United States. Population health looks beyond delivering health services to patients and instead pushes healthcare providers to adopt a more systemic approach to identifying and influencing the determinants of community health. Managing population health will require new techniques to identify community health risks and the most effective, efficient community-health interventions.

### **The Productivity Paradox**

In recent decades, growth in economic productivity has failed to match growth rates of the post-WWII era despite exponential advances in computing and the rise of the information economy. Economists are concerned that today's information technology (IT) innovations are not economically transformational and are unable to support higher rates of productivity growth. Low productivity growth has contributed to a contracting middle class and marginal wage growth for a majority of workers

### **Rejection of Expertise**

Public skepticism toward well-credentialed experts is growing, in part because of a perception that they have failed to recognize or address persistent sociopolitical problems. Expert pronouncements are having less impact on public perception, with the public turning instead to non-credentialed and "unofficial" sources for guidance and information. At the same time, information is increasingly able to route around gatekeepers, diminishing their influence and ability to shape discussion and debate.

### **Reputation by the Numbers**

Vast amounts of data will support reputation systems, and reputation will increasingly eclipse credentials for landing a job. As worker reputation systems and human resources analytics grow, assessment of an individual's suitability for a job will be driven by a person's algorithmic match to needs.

### **Re-Working Career Pathways**

The idea that the course of people's professional lives is settled in their twenties is long-outmoded, but employers and life structures have been slow to adapt to this fact. However, organizations are

increasingly assisting with midlife transitions, such as going back to school, enhancing skills for new career directions, or allowing for reduced hours so that employees can pursue other interests. Such steps create a need to rethink work, education, and social safety nets to accommodate new approaches.

### **The Sharing Economy**

The sharing economy—the peer-to-peer exchange of goods and services—will continue to grow globally and expand into new areas of commerce, posing a greater challenge to incumbent firms in many industries. The sharing economy portends a shift in the balance between access and ownership, with owners getting new opportunities to extract rents, and users getting new opportunities to use goods and services with more flexibility. The sharing economy can blur the lines between commercial operations and person-to-person exchanges, creating a growing regulatory challenge.

### **A Shifting Environment for Content**

Content producers face an increasingly challenging environment. Audiences are fragmented and distracted, and they expect to be entertained and informed for free. Delivery channels are shifting rapidly for both economic and technological reasons, a trend likely to accelerate over the medium-term future.

### **Shifting Terrain for Advocacy**

In the United States, a bitterly divided House and Senate, shifting power between Congress and regulators, and conflicts among federal, state, and local governments will change the nature of policymaking. National-level gridlock will drive more efforts at policy innovation toward state and city governments. All of this will change the arena in which advocacy occurs.

### **Socializing Reshaped**

Social media, telecommuting, digital entertainment, and shifting social norms are reshaping patterns of socializing, both online and in person. A growing percentage of social interaction is now digitally mediated. Work life and social life are increasingly occurring in the context of online social tribes and communities. The need to change one's physical location to socialize and work with others is declining.

### **The Splintered Society**

Americans are self-segregating along multiple divides, both online and offline: politics, economic status, educational attainment, social life, consumer spending, media choices, and geography. This is being fueled as much by political polarization as by economic and social inequality.

### **Standards Under Pressure**

Standard setting will be marked by more conflict. Internationally, countries are using standards to advance competitiveness or dominance. Within countries, social issues are playing out in standards, making them more political in a polarized era. Associations will be participants in these conflicts—and also potential mediators.

### **Taming Big Tech Dependency**

A handful of global consumer-technology platforms—Facebook, Google, Apple, Amazon, and their subsidiaries—increasingly shape entertainment, news, commerce, and even personal interaction. The unprecedented (and still growing) power and influence of these companies create a variety of challenges for both governments and civil society, prompting governments to step up their oversight.



### **Towards a Spectrum of Abilities**

Changing attitudes and technological interventions are shifting the nature of disability and blurring its boundaries. Gaining ground is the concept that disability and ability are not a binary but instead a spectrum, with every individual's physical, behavioral, and cognitive traits falling on multiple points along that spectrum. These changes will increase the number of workers who would once have been characterized as "disabled," while also broadening that category. Organizations will need to navigate a complex and evolving terrain of expectations and rules.

### **Trade in Transition**

The rules of global trade are up in the air, with growing uncertainty about whether the trend toward global trade harmonization will be maintained. The United States and the United Kingdom have begun renegotiation of once-settled trade policies that supported economic globalization, pushing the world trade system toward greater economic nationalism.

### **Transparent Organizational Ethics**

Organizations will face new kinds of scrutiny as drivers of transparency proliferate. Ubiquitous connectivity and information-capture, new sensing capabilities, and pervasive social media all enable hyper-transparency of organizations' actions, necessitating actively managing reputation in a world increasingly concerned about ethical behavior.

### **Virtualized Meetings**

Ubiquitous broadband, the mainstreaming of virtual reality, and robotics are accelerating the capabilities of telepresence technologies. These technologies could enable the telepresence of both speakers and participants at meetings. Or meetings could take place entirely in a shared

digital reality. While these technologies can broaden participation and generate novel experiences, the social and experiential benefits of "real life" may prove challenging to replicate.

### **Volunteering**

Cultural, demographic, and technological changes are altering volunteer expectations and experiences in an increasingly dynamic and digital organizational environment. Associations and nonprofits are experimenting with more flexible roles and structures to support collaboration and contribution.

### **Who Owns the Data?**

In the United States, there is a growing movement among technologists and consumers to give individuals more control over data about themselves (their identifying information, online communications, purchasing histories, social media habits, etc.). This idea may prove a challenge to existing industry models, as free consumer data is the lifeblood of many popular online services and programs, particularly mobile applications.

## DEEPER DIVES INTO THE DRIVERS OF CHANGE

The research team from Signature i and Foresight Alliance analyzed each of the 50 drivers of change to understand its long-term implications, key unknowns, and potential forecasts. A pool of ASAE volunteers assisted in analyzing the drivers of change and identifying potential action steps associations might consider. These analyses were then collated and documented in action briefs for the association community.

The first three drivers of change action briefs—Aging World, Anticipatory Intelligence, and Virtualized Meetings—are available free to ASAE members for a limited time. The drivers of change are available in The ASAE ForesightWorks Complete Collection, which also includes the User's Guide. Additional tools and resources will be rolled out and the drivers of change will be updated on an annual basis.

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### ABOUT ASAE FORESIGHTWORKS

ASAE FORESIGHTWORKS is a deliberate, evidence-based research program and emerging line of products to provide association professionals with a continual stream of intelligence about the changes facing the association industry, including

- regularly updated action briefs;
- tools for applying insights from the research in your association;
- guidance in performing environmental scans;
- opportunities to engage with peers around the research.

Ultimately, the program's mission is to empower association leaders to create a culture of foresight in their associations and to lead their organizations confidently into the future.

Check the [asaecenter.org/foresightworks](https://asaecenter.org/foresightworks) webpage and follow @ASAEfdn on Twitter for updates on new findings and events.



**ASAE FOUNDATION PROVIDES** future-oriented research for the benefit of ASAE members and the association management profession. The foundation seeks to identify critical trends and effective practices by conducting cutting-edge research no single organization can undertake on its own, while delivering the highest degrees of credibility and impact. The foundation partners with other organizations in the nonprofit arena, as well as leading research and consulting firms and top colleges and universities to provide the most significant and relevant information on the association industry.

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