

A woman in a white lab coat and safety glasses is working in a laboratory. The scene is illuminated with red neon lights, creating a futuristic and high-tech atmosphere. The woman is looking down at her work, and the background shows various pieces of laboratory equipment and glowing red lines.

STARCOM TRENDS 2022

A YEAR OF
RESILIENCE

DEFINING THE MOOD OF SOCIETY IN 2022

1. THE FIRST WORD THAT COMES TO MIND FOR 2022

DEPRESSION FEDUP IDEA
OK LOCKDOWN NEWSTART SHIT
CRAP FREEDOM HELP MEH
HOLIDAY HOPEFUL SCARED
HOPEFUL ANXIOUS CAUTIOUS PARTY
BORED POSITIVE CHANGE
DIFFERENT RESIGNED CORONA COVID
ONE UNHAPPY

2. WORDS THAT WILL DEFINE 2022

| | |
|-------------------------|------------------|
| 23% Resilience | 9% Growth |
| 22% Hardship | 3% Ease |
| 16% Togetherness | 2% Speed |
| 10% Kindness | 5% Other |
| 10% Opportunity | |

3. THE UK BELIEVES SOCIETY'S NEW YEAR'S RESOLUTIONS FOR 2022 SHOULD FOCUS ON KINDNESS, HEALTH AND SEIZING POSITIVE OPPORTUNITIES



STARCOM'S TRENDS FOR 2022



WORK RESET

Employees are reevaluating the meaning of their work



VIRTUAL OWNERSHIP

Virtual possessions are more commonplace and mean more to us



YOLO OPPORTUNITIES

After the pandemic, people want to take opportunities when they can



REPAIR AND RENEW

'The right to repair' act reflects desire to extend the life of belongings



NATIONAL PRIDE

Another big year of sport will trigger more national soul searching

WELCOME!

Welcome to Starcom's Trends for 2022 report, where we outline the trends and the tensions that we believe lie ahead in the months to come and are worth planning for. Our starting point is always culture; what new behaviours, legislations, celebrations and concerns are shaping society? And what will they mean for advertisers? For where there are challenges in society, we believe brands have a responsibility to try to find the resolutions that matter through media.

2022 will continue to be a year full of opportunities and challenges. From the pressures surrounding the climate crisis to the excitement of another huge year for international sport, there is the sense that we all need to dig deep and perform against all the odds. So much so, that this year we've identified 'Resilience' as a common thread that runs through much of what we see and the trends we've outlined in this report. Both communities and brands are showcasing incredible strength during prolonged uncertainty and are adapting their behaviour in fascinating new ways. These include YOLO mentalities, a work reset, national soul-gazing, the desire to repair and renew cherished items, and leaping into the future with virtual possessions.

We hope you find this report interesting and inspiring, but most of all useful. To find out more, speak with your Starcom team to discuss how to dig deeper into these trends and our data.

*Thanks
Nyo*

NADINE YOUNG
CEO OF STARCOM UK AND THE STARCOM TEAM





WORK RESET

Work to Survive vs.
Work to Thrive

WHAT'S HAPPENING:

EMPLOYEES ARE REEVALUATING THE MEANING OF THEIR WORK

Around the world, people are leaving their jobs in what has come to be known as the 'Great Resignation'. Microsoft's research found 41% of the global workforce was considering leaving their employer in the near future. Job vacancies here in the UK have surpassed 1.1 million, an all-time high since records began, and according to recruitment firm Randstad UK, 24% of the UK are planning a change within three to six months.

This shake-up in employment is in part due to an explosion of work thanks to the backlog caused by lockdown. WIRED has suggested that, 'Intense growth, coupled with the flexibility of remote work, means white-collar workers have more choice where they ply their trade than ever before.' It is now an employee's job market.

But more than this, factors including the virus, generous furlough schemes, burnout and stress have triggered much contemplation about our sense of purpose and how we spend our time.

Data collected by trends agency the Foresight Factory reveals a nuanced experience of work during lockdown. Whilst 46% of Gen Z felt the pandemic had a negative impact on their work, the stats are opposite for those aged 35-44, with 33% saying things have improved. The workplace's ability to offer us a sense of purpose, belonging and control depends on how employees have felt its absence. What kind of life does each of us want to lead and how does our career fit within that?

The popularity of anti-work rhetoric suggests that people are seeking a new age of work. In China, the youth movement of 'Yang Ping' or 'lying down', is a direct social rejection of the '996' working culture (9am-9pm 6 days a week). On Reddit, the 'r/antiwork' forum has seen subscriber numbers rocket almost 400% in the past year to reach 900,000. In the UK, 'Time Millionaires' may not be affluent in pounds, but they celebrate their extended leisure time, working the minimum and living more frugally.



WHAT IT MEANS FOR BRANDS:

RESILIENT BRANDS WILL SEIZE OPPORTUNITIES AND STRENGTHEN THEIR PURPOSE

Whilst talent lies at the heart of business, logistics are fundamental to keep things moving. Across the UK, empty shelves have offered a visual reflection of companies' struggles to recruit staff to collect, store and display products. In the short term, brands need to address these logistics concerns – how flexible and adaptable they can be with new suppliers, new consumer groups and even new need-states to ensure their products can get to those interested in buying them. Engaging consumers with updates, promotions, as well as information on where and when products will be available will encourage their support and patience in the turbulent few months ahead.

In the longer term, businesses should find time to indulge in some soul searching, engaging with their staff and partners around what inspires and motivates them. McKinsey's research in the US found that 70% of employees find their purpose in life from the work they do. They found that those who were able to live their purpose at work were more productive than people who didn't. So, purpose – more than an office pool table or even pay – seems most likely to engage and retain staff.

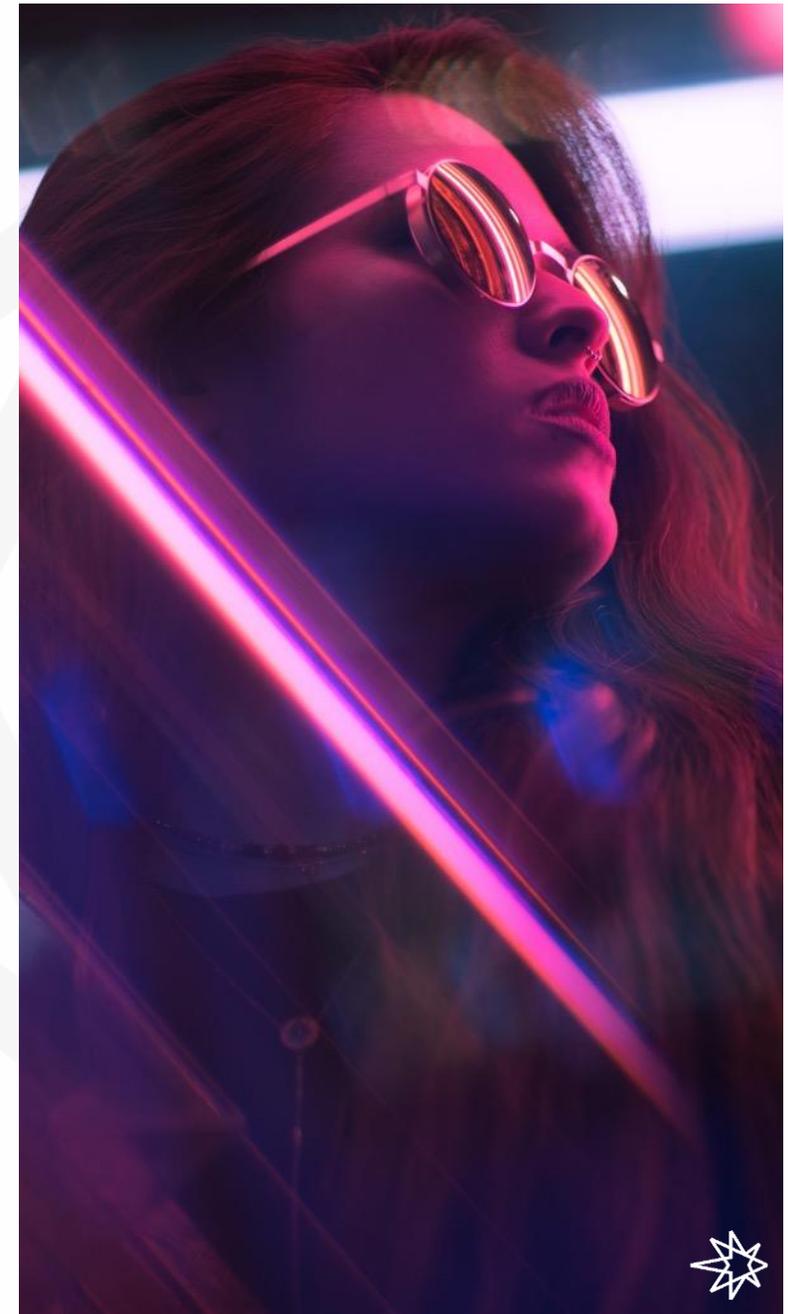




WHAT IT MEANS FOR MEDIA:

A NEED TO EMBRACE SMART MEDIA BUYS, SMART STAFF AND SMART CONTENT

- 1. Interactive media:** In the same way that supply chains are becoming more flexible and often localised to focus demand, media plans should be adaptable too – both in terms of content and messaging, as well as in terms of audience definition and region. Solutions include engaging with customers through social, local and interactive media that can be targeted, personalised and regularly updated with new information.
- 2. Staff Influencers:** Celebrating and showcasing staff stories is a powerful way for companies to not just talk about concepts and ideals, but to bring their business to life through human stories. These stories of course can only be told if backed up by concrete support systems, such as crèche facilities, mental health support systems or flexible working options.
- 3. Long-form media:** And for those of us rejecting the stress of work and attempting to carve out more time and leisure for ourselves, media should make that free time feel more meaningful. Podcasts, long-form content or experiential media can help provide the enrichment we are all craving, from focused learning to a means to find relaxation and be entertained.



BRAND EXAMPLES:



The John Lewis Partnership opened an LGV driver academy to reduce the lorry driver shortage, aiming to train potential drivers within 13 weeks.



80% of the soap brand Beco's staff are disabled (100%, we are told, are brilliant!). To bring awareness to the employment challenges facing the disabled community, Beco encouraged other companies through B2B comms to, 'steal our staff'.



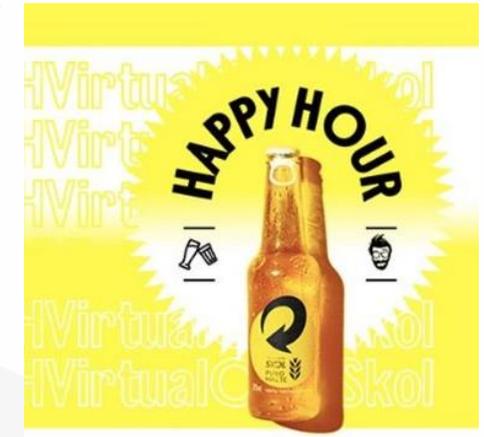
Skol's Virtual Happy Hour provided companies in Brazil with a convenient and reliable resource to treat their employees working from home to a communal drink. This helped them to socialise and feel part of a team.



The 'We are the NHS' recruitment campaign focused on NHS staff pride. In reminding us of the invaluable work they do, university applications increased, and job satisfaction from current staff rose by 15%.



Beco



Skol



John Lewis



NHS



OUR DATA REVEALED OF THOSE IN WORK...

55% believe people today are expected to work too hard for not enough reward

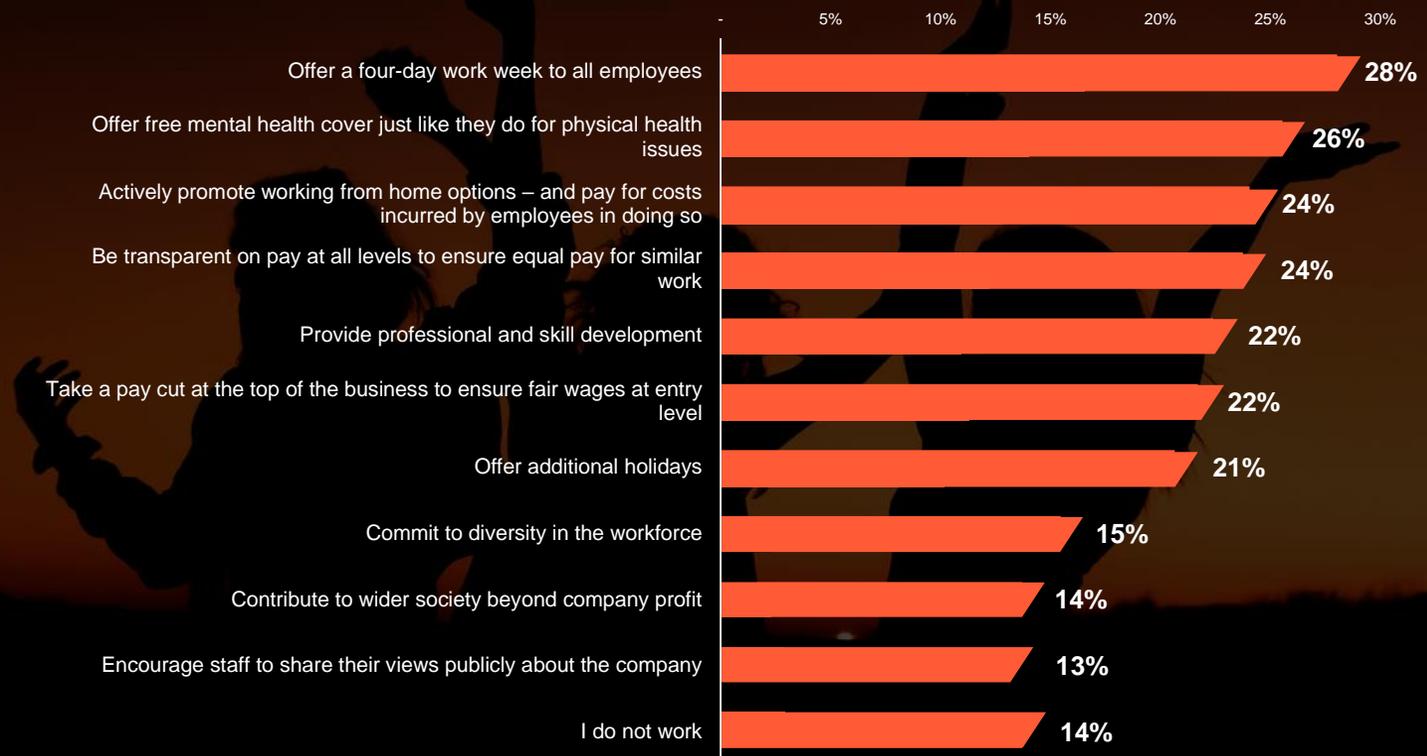
47% admit the COVID-19 pandemic has meant they have reconsidered their work/life balance

33% are prepared to sacrifice financial security for a more exciting role (47% of 18-34s)

39% are willing to take time out from work to upskill to get a new job/a new role (43% of women)

32% believe their employer has not demonstrated enough adaptability in the face of so much change

WHAT CAN EMPLOYERS TODAY DO TO SUPPORT THEIR STAFF? TOP THREE STATEMENTS





VIRTUAL OWNERSHIP

Virtual Possessions vs.
Augmented Assets

WHAT'S HAPPENING:

A POPULATION REPLACING REAL WORLD EXPERIENCES WITH THEIR ONLINE ALTERNATIVES

The UK is a leading nation when it comes to both time and money spent online. Today, Brits spend more time online in 2020 than any other major European country according to Ofcom, and only China and the US see higher online sales by volume. The shift in behaviour through prolonged lockdown periods has pushed it even higher with a 48% growth in online shopping in 2020. Across all demographic groups, we are increasingly turning to online experiences to socialise, entertain and shop.

However, we aren't just shopping for physical things. It makes sense that as we spend more time in virtual spaces, people are willing to spend on items that give our virtual experiences greater status, capture memories or allow us to build greater connections with the ideals or people we care about. This goes beyond digital ownership of the past, i.e. books, music, or online storage, which were generic and replicable, with little ability to personalise.

The use of NFTs (Non-Fungible Tokens; blockchain certifications of ownership of a digital asset) means that it is now possible to have the bragging rights to a specific digital asset that is unique, could be personalised and meaningful to its creator and owner.

Online platforms, particularly gaming, remain vitally important social spaces in a post pandemic world, allowing people to meet and unite with others in spontaneous and meaningful ways. Even when real-world pandemic restrictions ease, online worlds will remain as core spaces where people build status, have glorious adventures, collaborate and build meaningful relationships. This includes spending money in-game, whether it is buying accessories and skins for avatars, buying art and fashion items, or investing in crypto currencies such as Bitcoin.



WHAT IT MEANS FOR BRANDS:

HUGE POTENTIAL FOR COMMERCE THROUGH VIRTUAL OWNERSHIP FOR MAJOR BRANDS

When brands consider how they can offer virtual sole ownership to their customers, co-creation and personalisation can be adopted at scale to build strong relationships with customers. Virtual commerce also provides brands with a platform to test products virtually before manufacturing them physically, as well as rewarding early virtual collaborators with public bragging rights for engaging at the early stages of development.

Virtual ownership also provides a creative and inspirational way of crowdfunding for new products, particularly for smaller, niche companies. Through NFTs, customers could own virtual 'shares' of a brand, providing a more compelling way to support the companies they care about than simply following or promoting them on social media. Brewdog used a similar model to enter the mainstream market by selling digital 'shares' without going through the IPO process, and selling shares also helped Oculus fund their first headset. Such public investment allows brands to give value to their supporters in new ways beyond the traditional Patreon model and signal high levels of trust of their brand to non-customers.

Virtual ownership may also be an important first introductory step to getting to know a brand. Gaming influencers and virtual characters act in the same way as traditional TV or film icons, heightening perceptions to young audiences unfamiliar with the category or brand. Luxury brands such as Gucci are selling virtual fashion with a lower-than-normal price tag to connect with new audiences, building positive brand associations and (hopefully) loyalty. The aim is for these to evolve into more expensive, physical purchases later down the road. Similarly, travel brands are finding virtual tours and adventures as a means to showcase their settings to potential visitors. Sentosa, a resort island in Singapore, became the first branded island in Animal Crossing in May 2020, hoping that it would trigger interest in a real visit in the future.

Ultimately, when brands are sure – not just of the physical product they sell, but the consumer need they fulfil – they can expand their services into virtual spaces with new products and services. As Lucy Jameson co-founder of Uncommon Creative Studio said, "Working out what you sell is urgent. The gyms who think they sell a space to work out are currently closed, the ones who realised they sell motivation and belonging are finding new audiences and revenue online."



WHAT IT MEANS FOR MEDIA:

BE BRAVE. THINK BEYOND WHAT HAS
BEEN DONE BEFORE TO TRULY ENGAGE
IN THESE NEW SPACES

1. Creative: Gaming platforms are an increasingly important media channel for brands to engage with. Play can be serious and transformative; players can discover new facets of themselves and experience things that would be impossible in constrained real-world situations. The creative possibilities of both layered augmented experiences and transformative branded virtual ones are increasingly sophisticated. Offering customer experiences in these new spaces are limited only by a brand's imagination. We should think far beyond just virtual billboards and banners...

- 2. Targeting:** Understanding how the needs around virtual possessions in these new spaces will be key. How can items be exchanged, or updated in new ways? And beyond branded stores, how do virtual communities want to be approached by brands? Working with media partners who know these communities best will be critical to ensure the right tone is struck.
- 3. Strategy:** When considering experimenting with virtual goods, clarity on its purpose is key. Is it a marketing tool to increase the desirability of physical goods, using avatars as billboards? Or is it a profitable additional revenue line, perhaps selling virtual goods to people who can't afford the real thing yet? Brand strength and resilience will be key as businesses aim to cut through and stretch their relevancy into these new spaces.



BRAND EXAMPLES:



In February 2021, NFT marketplace RTFKT, recently acquired by Nike, sold 600 pairs of digital sneakers in just seven minutes, generating \$3.1 million in sales.



Visitors to Chipotle's virtual restaurant received coupons for a free burrito from a real-world Chipotle restaurant.

GUCCI



The Gucci Garden space on Roblox allowed the platform's 42 million users to spend from \$1.20 to \$9 on collectable and limited-edition virtual accessories.

paco rabanne

Paco Rabanne lit up pitch-side perimeter boards in Football Manager last Christmas every time a team scored to promote their Invictus range. Out-of-home media provider Ocean is now planning to sell out-of-home inventory in the metaverse.

Etsy

Etsy created a shoppable virtual house last year. The interactive augmented reality experience allows customers to tour a digital home filled with décor, furniture, art and other items from the online marketplace.



Gucci



Chipotle



Etsy



Paco Rabanne



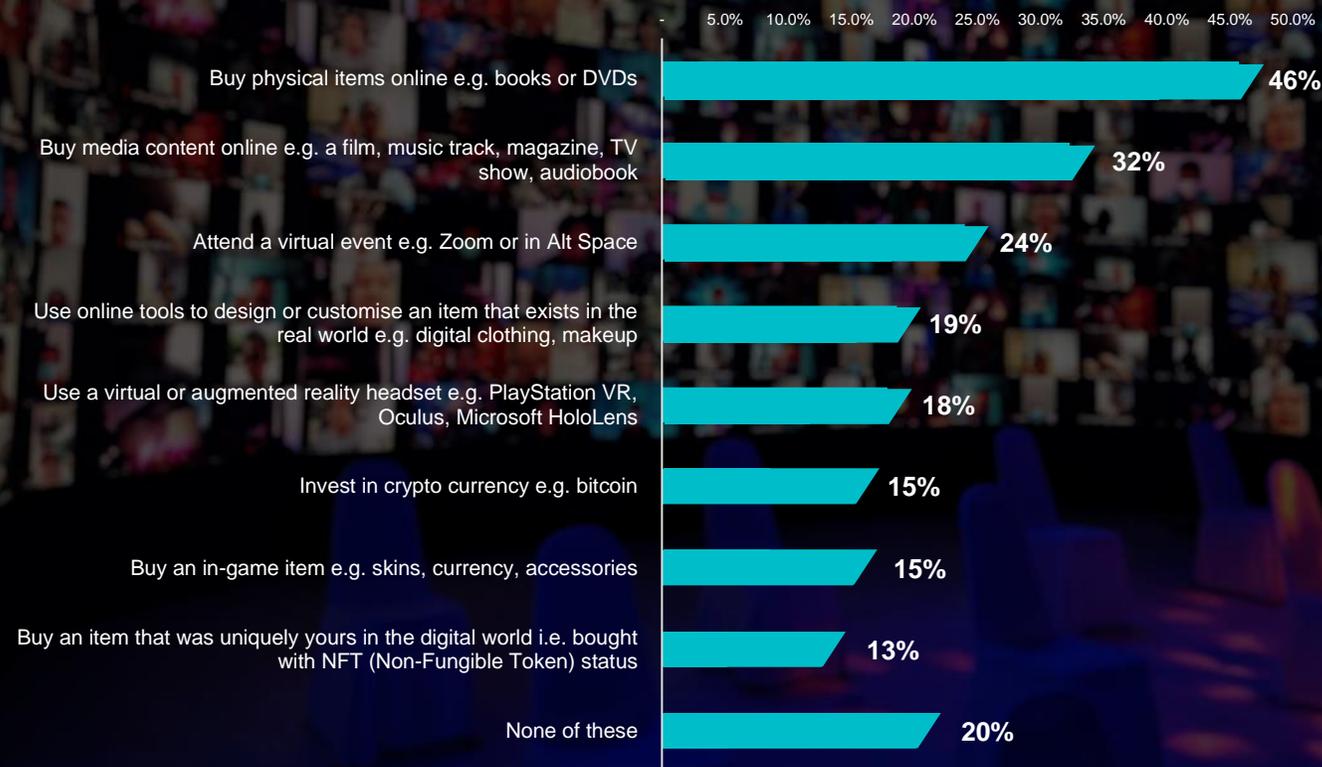
Nike



OUR DATA REVEALED...

- 56%** believe society will increasingly spend more time in the virtual world (67% of 18-24s)
- 40%** believe the virtual economy offers more creative and dynamic items than in the real world (60% of 18-24s)
- 40%** believe it is better for the environment to own digital possessions than physical objects
- 36%** believe physical items, like clothes, books, cars etc. should come with digital assets and benefits
- 61%** Yet... 61% feel digital products will never be as valuable as physical ones

HAVE YOU USED OR ARE INTERESTED IN THE FOLLOWING VIRTUAL ITEMS?





YOLO OPPORTUNITIES

Spontaneity vs.
Risk Averse

WHAT'S HAPPENING:

PROLONGED PERIODS OF UNCERTAINTY AND ANXIETY CAN RELEASE MOMENTS OF YOLO JOY

The acronym YOLO – ‘You Only Live Once’ – is having a moment. During heightened periods of trauma and stress, people inevitably abandon careful planning and risk-averse behaviour, instead throwing caution to the wind. Society is experiencing a prolonged moment of stress, fuelled by multiple factors including the climate crisis, the global pandemic and associated trade and economic uncertainties. Alongside the usual traditional life-changing moments such as moving home, starting a family etc. As nations move between various levels of lockdown, with still no clear end in sight, the sense of “oh why not!” in moments of relaxed restrictions is a trigger for many people to go beyond their comfort zone.

This YOLO mentality will come out differently in all different contexts and for different individuals. We should also stay attuned to the social shifts of traditional patterns in favour of emerging life moments. For example, fewer couples are getting married and therefore the traditional stag do is on the decline. In its place, the ‘Dadchelor party’ – one last blowout for a father to be – is on the up.

Emerging from the United States and increasingly seen in the UK, this party reflects how family, rather than a legal partnership, marks a fundamental change in lifestyle. It also highlights a gender balance shift as fathers anticipate taking on equal roles within childcare. People still crave the need to celebrate these important moments that delineate our lives and mark change in our lifestyles.

There is also a rise in what is being called, a ‘new essentialism’, where people question with increasing impatience, assumed rules and codes of behaviour. Isolation and instability has caused untold damage to our mental health, meaning burnout and stress are sure to be rife in 2022. We need to grab opportunities for escapism and fun, but also find meaning in our lives. We want employers, politicians, and brands to remove the things that no longer serve us. Whether clutter, (WRAP estimated we would discard 67 million items of clothing in UK homes post lockdown) to pollution, incompatible partners or unrealistic societal standards, people are trying to let go of what no longer serves them.



WHAT IT MEANS FOR BRANDS:

REAL TIME BEHAVIOURAL DATA WILL BECOME KEY TO UNDERSTANDING NEW DECISION MOMENTS

It's easy to assume that because audiences are of a similar mindset or life stage their interpretation of YOLO would be the same. That would be a mistake.

Everyone's personal circumstance has differed in recent months. YouGov's Britain's Mood Measured Weekly tracker revealed how different similar people's emotional needs were, alongside how much could change from one week to the next. There have been as many different pandemic experiences as there are households. Brands must therefore lean on recent data sources and social listening as well as smarter segmentation methods to find new ways to group like-minded individuals.

What does unite everyone, however, is a general desire to have some control to counter the levels of uncertainty at a societal level – even if only in mundane or domestic ways. Brands need to offer consumers clarity and transparency as well as flexibility and choice to suit changing needs and circumstances.

Being able to track delivery times, book tables or spaces easily at short notice, understanding the provenance of materials and/or ingredients as well as having a clear understanding of a brand's purpose... these are all important trust signals that reassure consumers to feel they can let go and indulge.

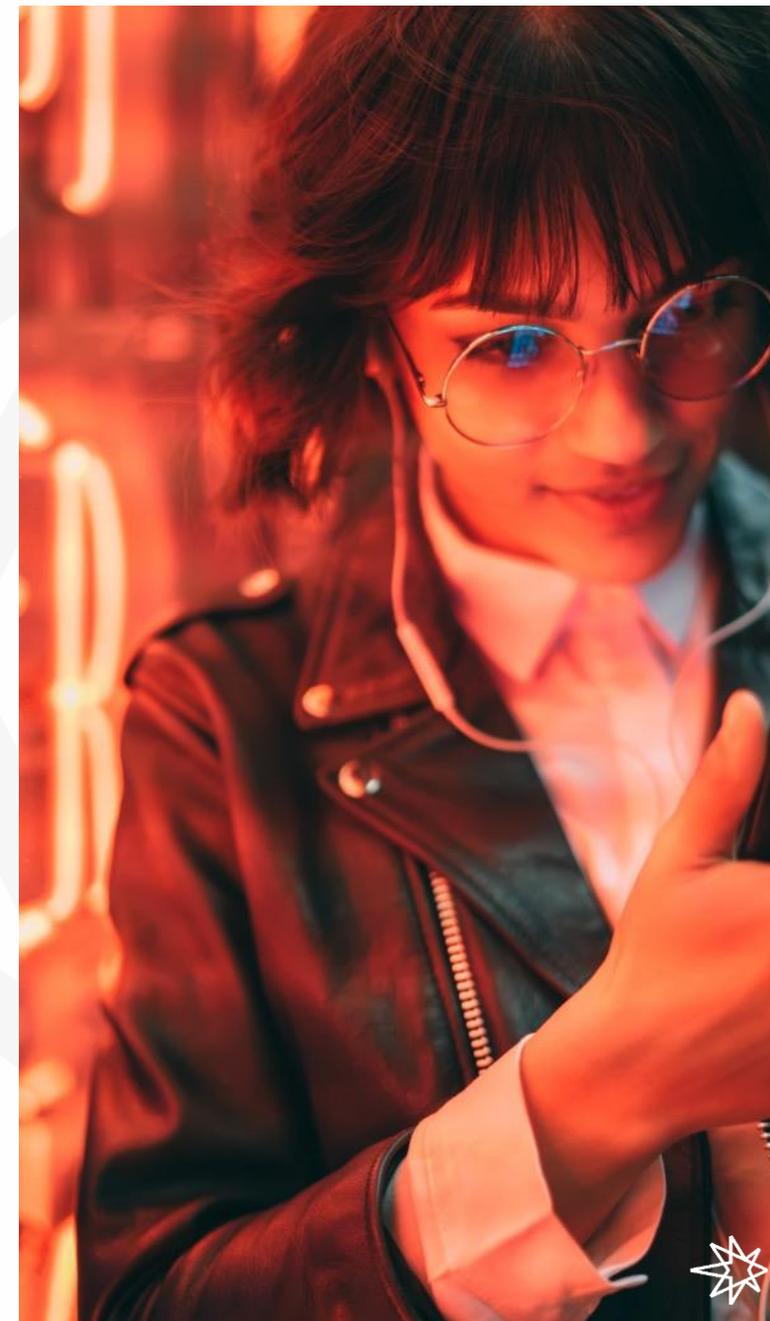
Crucially, companies must consider how they can lighten the load for their audience. To support our mental health, how can brands lighten not just load, but even the perception of the load, as well as offer solutions to help people remain resilient. Where can we support breaks, provide entertainment, and minimise chores and admin? Consider what other assumptions or challenges we face daily that your brand can counter with a message of: 'You don't need to worry about that in your life right now. Focus on where your energy lies.'



WHAT IT MEANS FOR MEDIA:

MEDIA MUST BE FASTER. WE NEED TO THINK YOLO TOO AND EMBRACE OPPORTUNITIES THAT EXIST NOW

- 1. Real-time data** sources become essential if we are to understand what people are prepared to turn up to and what they will turn down. Individual risk assessments – and often also a desire to change and shake things up – mean we can't rely on old data sources that predict herd behaviour. Instead, media partners are finding new sophisticated ways of tailoring creative to audiences. Vevo offers an option to target people according to frame of mind, by analysing and grouping music according to four different moods. Rezonance's declared interest targeting served on publisher FreeWall is another way of serving content according to an audience's needs, specified by a survey which informs the advertiser and unblocks content for the reader.
- 2. Flexible content:** It also means being agile with your content and media buying teams, responding to different consumer needs as we still expect political statements and rules to continue to throw curve balls at retailers, manufacturers, and suppliers. Finding a means to adapt communications to be relevant to the day's rolling news agenda is essential, as brands can help often bewildered consumers make sense of the turbulent world we are currently living in.
- 3. Media on the Move:** Unpredictability also places an importance of having flexibility in your media plan (something programmatic can currently cater for), or media that moves with your audience (e.g. podcast or social or online video). TfL Oyster data, buyable via Global Media, allows us to identify audience movements and segment according to where they go and what that implies about them.



BRAND EXAMPLES:

CLINIQUE

Clinique's ClinicalReality is an online diagnostic tool which analyses a customer's face in 30 seconds online, then provides recommendations and matching products to support skin regimes.



KP's 'Nuts about Christmas' campaign last year sought to adapt to the mood of the nation, celebrating individuals' unique Christmas experiences rather than the usual focus on the collective. The campaign evolved amidst the changing rules and regulations too, going from 'Christmas excitement' to 'what Christmas means for me'.



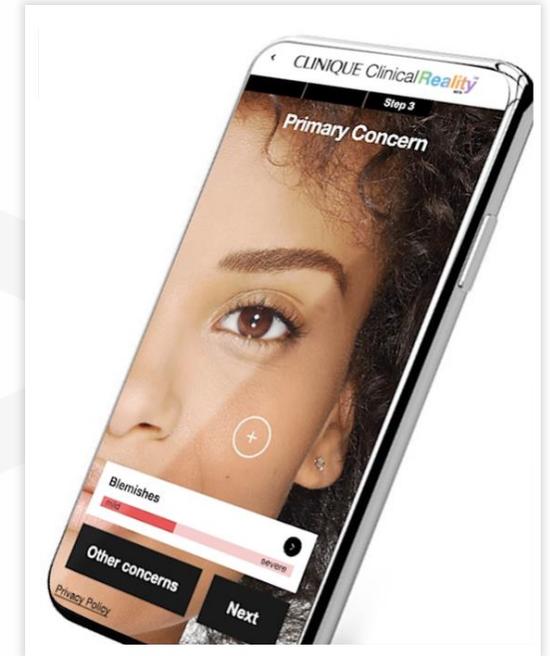
AXA worked with Spotify's streaming Intelligence data to target by mood and mindset, delivering positivity when consumers were active in order to promote their health insurance plans. Their innovative 'Feel Good Health Playlist' generator covered everything from Kitchen Disco to A Moment's Pause and Take a Walk.



KP



AXA



Clinique



OUR DATA REVEALED...

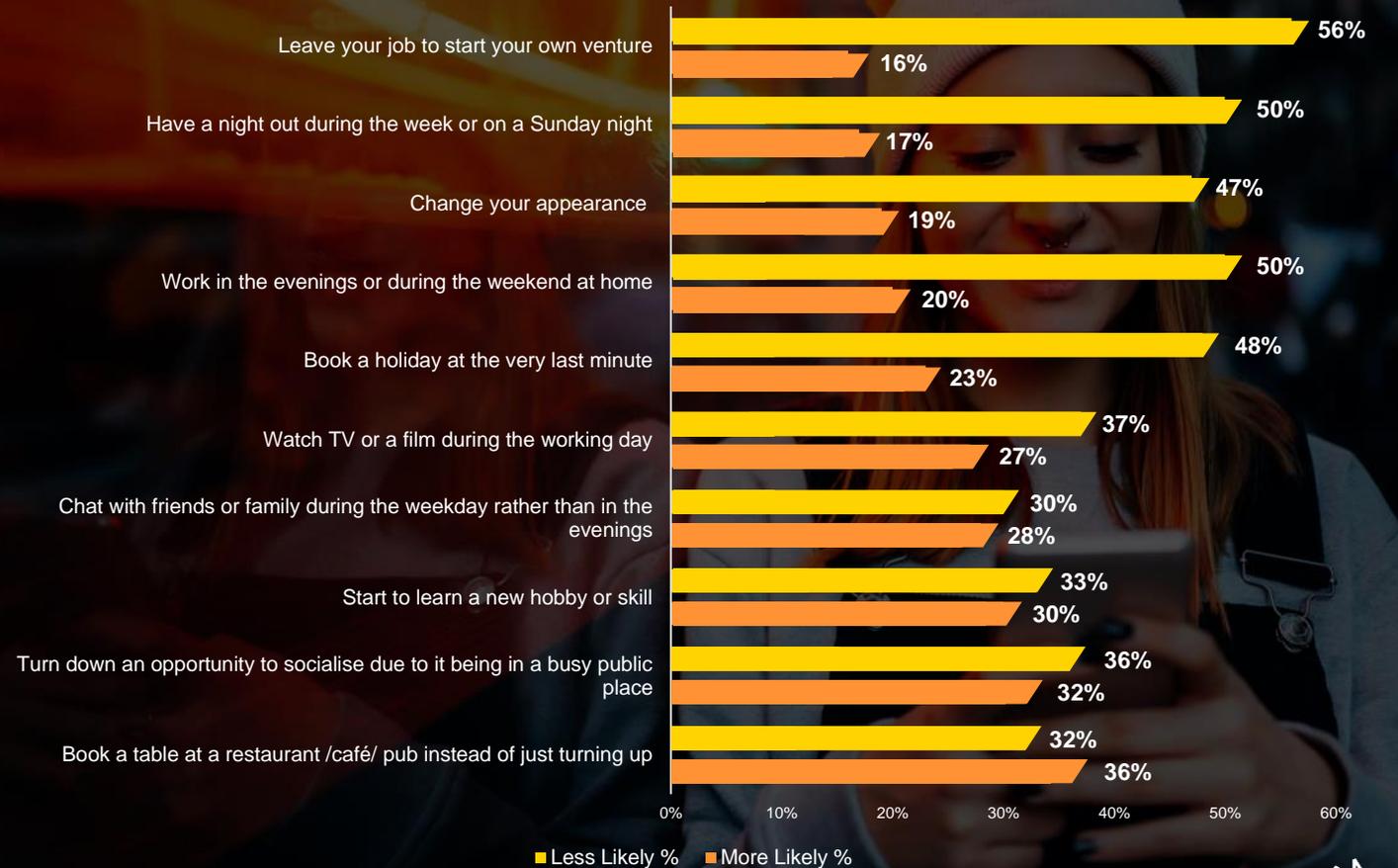
69% believe it is more difficult today to be spontaneous than it was before the pandemic

67% say they want to seize opportunities where possible

61% believe they have missed out during the past two years during the pandemic (65% of 25-44-year-olds)

51% believe routines are more flexible than they used to be

WHICH OF THE FOLLOWING WOULD YOU BE MORE LIKELY TO DO NOW THAN YOU WOULD HAVE BEEN BEFORE THE PANDEMIC?





REPAIR AND RENEW

Extend vs. Update

WHAT'S HAPPENING:

THE 'RIGHT TO REPAIR' LAW TAPS INTO AN ESCALATING DESIRE TO RETHINK DISPOSABLE CONSUMERISM

On 8th July 2021, the UK put into law, the 'Right to Repair', meaning that in 2022 consumers will be able to seek repairs beyond the manufacturer on some white goods, either repairing an item themselves or with a third party. 'Planned obsolescence' has been a widespread strategy used to encourage consumers to upgrade products. According to the Ellen MacArthur Foundation via the Guardian, a typical item of clothing is designed to stay in a wardrobe for only five weeks. Doubling the average number of times a piece of clothing is worn can therefore halve the greenhouse gas emissions of the entire fashion industry.

Whilst brands have been exploring sustainability through sourcing low carbon materials or re-examining their global supply chain and production processes, John Donahoe, Head of Nike (formerly CEO of eBay) reminds us, 'the greenest product is the one that already exists.'

Laws like the 'The Right to Repair' signal a new era of manufacturing and consumption – and therefore a new relationship with customers. Until now, returning items has been a hassle and an expense for consumers. A brand's store or website was a place to visit only when you were on the hunt for something new.

However, according to the UN e-waste monitor in 2020, a record 53.6 million metric tonnes of electric waste was generated worldwide in 2019, up 21% over the past five years. There has also been a shift in mindset where second hand is no longer second best. We should therefore expect consumers to be demanding not just new things, but support for the things they've bought in the past. Shows like BBC1's The Repair Shop, which gathers around 7 million viewers each week, have elevated the profession of the repairer.

According to Mintel, 50% of 25-34s have repaired damaged or worn-out clothes in 2020. Increasingly, consumers would like to extend the life of the products – perhaps even guaranteeing them for life.



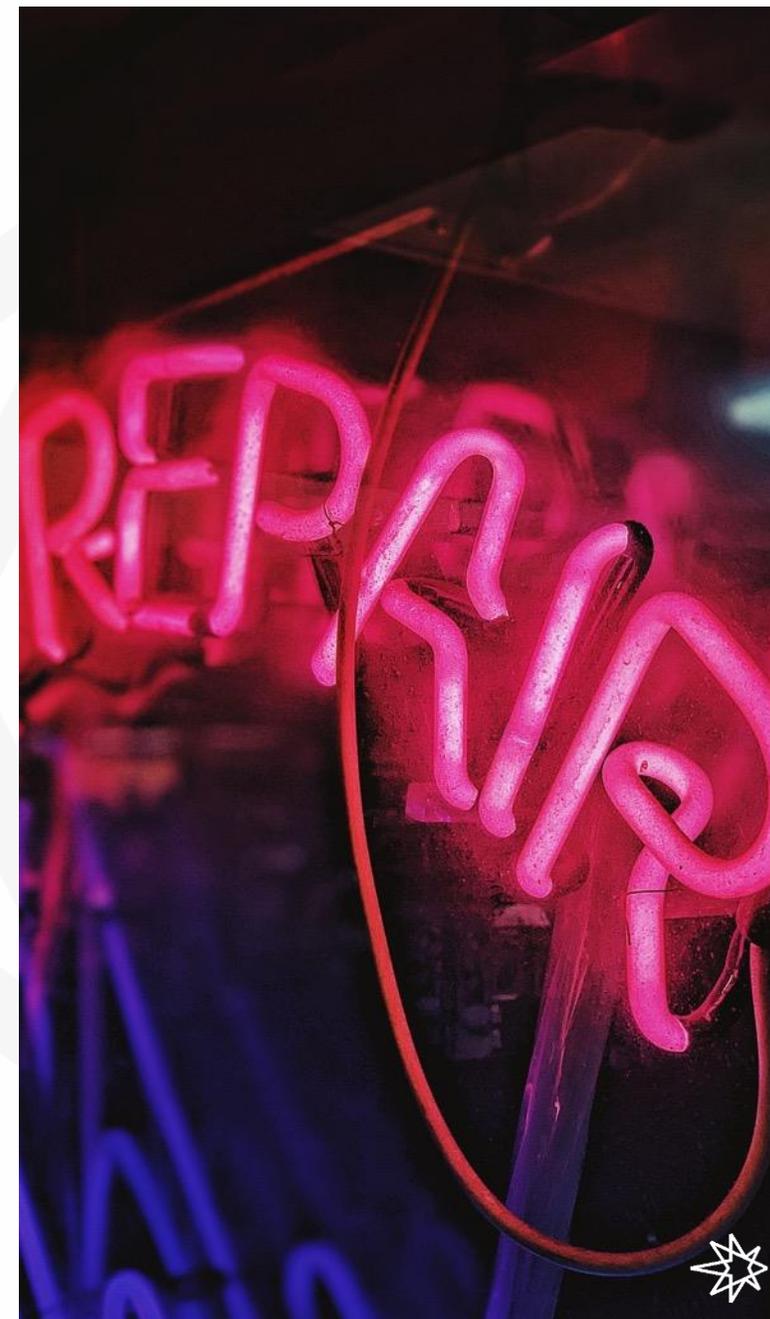
WHAT IT MEANS FOR BRANDS:

A SHIFT IN BUSINESS MINDSET TO NURTURE CUSTOMER AND PRODUCT

This trend is counter intuitive to how capitalism and advertising are traditionally perceived. Brands almost always focus on the 'new', the cutting edge of fashion and innovation. Profit usually stems from stacking high and selling cheap. But as business margins are squeezed, supply chains falter, and as consumerism shifts a gear, the idea of always attracting new customers is being reviewed and questioned. This could be the start of a radical shift in business and brand behaviour. During the turbulence since the start of the pandemic, 73% of CMOs have focused on customer retention in 2021 (Source: Gartner 2021).

Brands need to find profitable new ways to survive on past relationships as well as the new, as well as support the products they have already put into the world. Sub-brands or departments are being built that support, repair and re-engage with customers such as Patagonia's 'Worn Wear', which resells garments that only need a little TLC. Even when items can't be repaired, brands that offer a recycle system still relieve consumers of the pressure of disposing items themselves and provide another moment of brand connection. This model builds on the established subscription model, which spans everything from food to makeup, plants and clothing, and can lock in powerful loyalty for brands. Indeed, according to Barclaycard research, 82% of retailers reported that investment in sign-up subscription services fostered customer relationships, while 75% felt they could rely on this revenue more than one-off sales.

Repairing is an activity that encourages us to love the things we've already put out into the world and to value the relationships that sustain them. Education, inspiration and storytelling will allow brands to transform their sales narrative.





WHAT IT MEANS FOR MEDIA:



FOR AN INDUSTRY ALWAYS ON THE HUNT FOR THE NEW, HONEST RADICAL THINKING WILL SPARK A NEW ERA FOR ADVERTISING

- 1. Green Transparency:** The challenge brands face is in acknowledging their place in disposable culture as they seek a new balance – trying to highlight new, exciting products while encouraging people to care for and keep the items they have already. Being transparent and aligning with respected measurement systems and sustainable initiatives will build necessary consumer trust in both new and renewed products. Ultimately, consumers are looking for products resilient to wear and tear, and that will last longer than just one season.
- 2. Tailored Targeting:** Smart targeting by optimising on search terms will ensure that messages are tailored to where your audience is on the purchase funnel. Loyal customers should be tempted to consider alternative products, both new and second hand. Current but apathetic customers can be drawn closer to the brand by engaging in programmes of care, protection, repair, upcycling and upgrades.
- 3. Sustainable Media:** The repair ethos sits at the heart of the sustainable movement. Brands can ensure that all other aspects of their advertising are sustainable by offsetting production or creative emissions, as well as working with media partners who uphold the very best sustainable practices. It can reframe how we think of the creative process too. What ideas, creative or content previously discarded could be revisited, smartened up a bit and reused again?



BRAND EXAMPLES:

 Ikea's 'Trash Collection' campaign in Norway celebrates how IKEA's furniture found in rubbish piles can easily be repaired and resold. This is an important conversation point for IKEA whose furniture is typically seen as transient and ultimately disposable.

 Nike launched 'NIKE Refurbished' earlier this year as they enter the resale market. They allow customers to return a pair of shoes to be refurbished and resold at a reduced price.

 This year eBay launched its 'Certified Refurbished' hub in the UK to allow customers to find tech and appliances that have been inspected, cleaned and refurbished by the manufacturer or a manufacturer-approved vendor to meet the necessary specifications.

 Apple have had to announce a 'Self Service Repair', which will allow customers who are comfortable with completing their own repairs access to Apple genuine parts and tools.



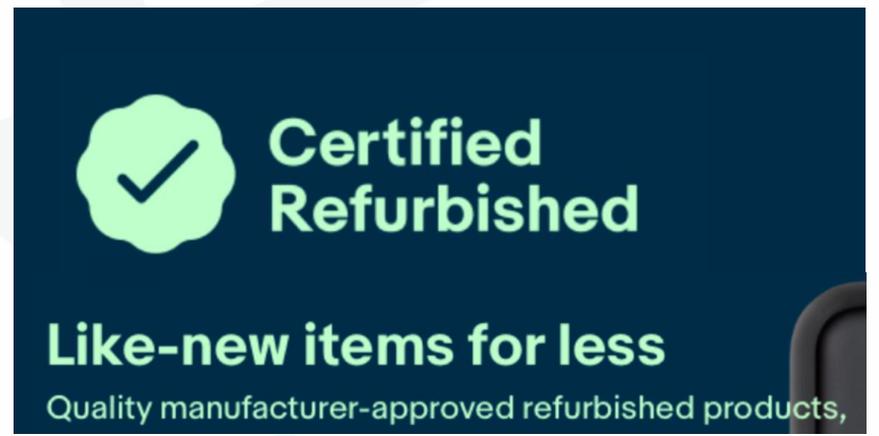
Ikea



Nike



Apple



eBay



OUR DATA REVEALED...

47% UK feel guilty about how much they consume. 16% feel very guilty

65% of 18-24s feel guilt around their consumption vs. only 25% of those aged 65+

65% would be prepared to pay more for a product that is guaranteed for life. 56% of those prepared to pay more would pay an extra 10-20%

58% would prefer to repair, mend, or update an item already owned than buy something new (30% strongly agree)

62% believe it should be a brand's responsibility to repair items when they are damaged or break down





NATIONAL PRIDE

Celebrate vs. Challenge

WHAT'S HAPPENING:

A UNIQUE YEAR OF SPORT WILL SHINE A LIGHT ON THE MOOD AND OUTLOOK OF THE NATION

This coming year, British sports teams will attempt AGAIN to bring trophies home. And for the first time ever, the UK's biggest spending season (Christmas) will overlap with the biggest sporting occasion (Men's World Cup football) providing a truly unique moment of togetherness (both tribal and family) in the national consciousness. And as the COVID pandemic delayed events scheduled in 2020, we will have back-to-back international tournaments, where the achievements and failures of British teams will be more vividly recalled than ever previously.

International sport is a powerful means for nations to hold up a mirror to their sense of place in the world. We can see this in how trade and political rivalries often play out during tournaments. Consider how America subtly changed how they reported on the medals table to take the top spot above China, reflecting the ongoing trade tensions of the two nations. Or the heated match between England and Scotland's men's teams at Euro 2020 match, which carried undertones of the tensions of Scottish and English nationalism.

But whilst the joy of international sport is to celebrate national idiosyncrasies, as communities feel more divided – even polarised – along class, region, and age lines, there lies not just a tension but a potential hypocrisy in discussing nationhood. Are national values – many which arguably have historic roots in a colonial past – something increasing numbers of people want to distance themselves from? Will 2022 be a year where nations challenge their own stories of selfhood? Or provide new necessary stories?

In the first year of the pandemic, nations experienced a unique collective spirit that was hugely positive.

However, as we enter the much tougher economic phase of recovery, we should expect the sense that 'we are all in this together' to erode. This means that both the unifying spirit, and stories of resilience in the face of defeat that electrifies sport, will be vitally important as we continue to look to what our sporting heroes and sporting achievements say about us as a nation.

The Euro 2020 men's England team showed incredible unity and resilience as they faced criticisms of taking the knee, soaring to the final and winning the hearts of many critics (or making them look very foolish indeed). Even their final loss, which triggered an ugly racist mob to reveal themselves, saw a backlash to hate across the political and social spectrum. It simultaneously revealed both how far we have come, and how far we still have to go.

Similarly, Emma Raducanu was criticised as being unable to 'hack it' after retiring unwell from Wimbledon, but mere weeks later won the US Open. This revealed a resilient ability to bounce back that audiences want to identify with throughout 2022.



WHAT IT MEANS FOR BRANDS:

ADVERTISING PLAYS A FUNDAMENTAL ROLE IN REFLECTING THE NATION AS WE ARE, AND WHO WE WANT TO BE

In times of political and economic instability, stories and reflections of nationhood are important – providing a sense of collective belonging, trajectory and purpose. Brands can align with sport that provides vital moments of collective shared experiences and vital conversation currency.

Yet in 2021, 49% of black consumers in the UK agreed with the statement “advertising does not do a good job at representing diversity in this country.” (Source: Foresight Factory)

Whilst many brands do want to get involved with cause-related marketing, there is a delicate art to involvement here.

Young audiences are particularly sceptical of brands that appear to have only superficial support of causes such as promoting grass-roots sports. Brand activations and partnerships should include careful consideration to ensure the outcome is meaningful to those that are truly affected. Don't just turn up on game day.

Ultimately, advertising plays a hugely important role in how nations perceive themselves. More than ever in 2022, stories should be wrapped into a positive, optimistic future. British sports teams continue to excel on the national stage in many (but not all!) fields as they lean into a celebration of a diverse, humble and resilient talent – football, Olympic sports, rugby and tennis being current strengths. Brands and companies, in their own competitive fields and seasons of peaks and troughs, should similarly lean into a desire to build back better.



WHAT IT MEANS FOR MEDIA:

CULTURAL UNDERSTANDING IS KEY TO IDENTIFY WHAT UNITES US AND BRINGS OUT OUR RESILIENT BEST

- 1. Sponsorship:** Who and what we choose to sponsor are important questions as brands attempt to align themselves with the culture that speaks to their values. Similarly, who do businesses want to hold to account? Who needs to be challenged, and what techniques will be most persuasive? How can the British heritage be reimagined or revisited? What stories can we tell around the sporting heroes and nationhood in 2022 and how will we build on 2021's highs and lows?
- 2. Local knowledge and local forces:** To be relevant requires on-the-ground knowledge. Britain is not a brand with a playbook of values and behaviours. Typical and generic 'British' qualities can be displayed and expressed differently by communities and individuals, so understanding these with subtlety is important rather than a forced attempt to rewrite the national narrative. Collaborating with those experienced on the ground ensures clumsy attempts to connect are avoided.
- 3. Celebrate hope:** Often the attempt is to look backwards when it comes to nationhood, as if we can only be defined by our past. By looking backward, we can become more defensively tribal during tough times. So, media has a responsibility to shine a light on the positive qualities that will encourage and inspire others to stay resilient, stay together and be kind.



BRAND EXAMPLES:

BT BT aired 24 hours of women's sport on International Women's Day to showcase female athletes and broadcasters.



BT

British Red Cross British Red Cross overcame vaccine hesitancy through a digital OOH campaign with four different language creatives, scheduled on rotation in areas of the UK where 10% or more of the population spoke one or more of the featured languages.



British Red Cross

VISA VISA have continued to support local small businesses across the UK and last year invested part of their media budget into a grassroots business – ShopAppy to help small businesses sell online. Visa paid the membership fees for all shopkeepers who wanted to join and even funded staff for ShopAppy.



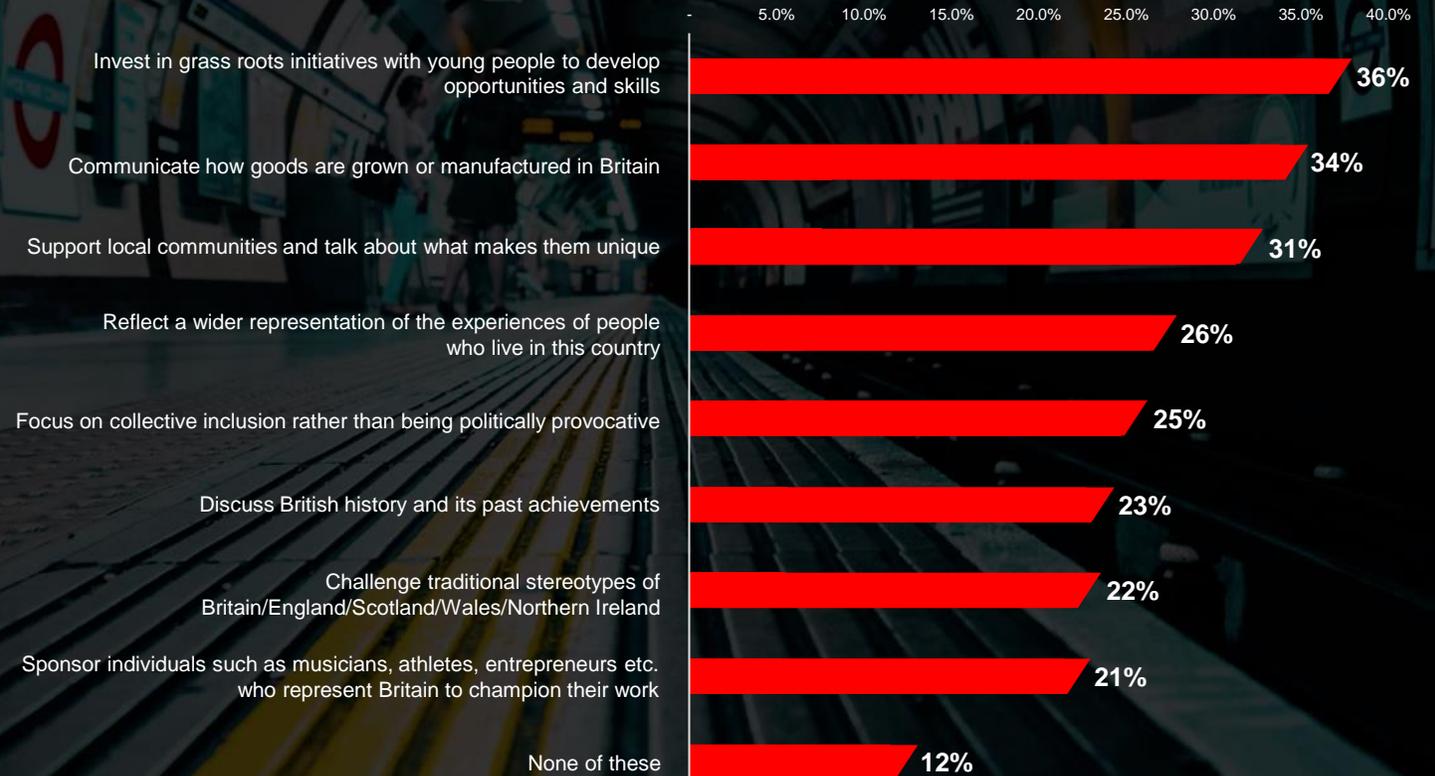
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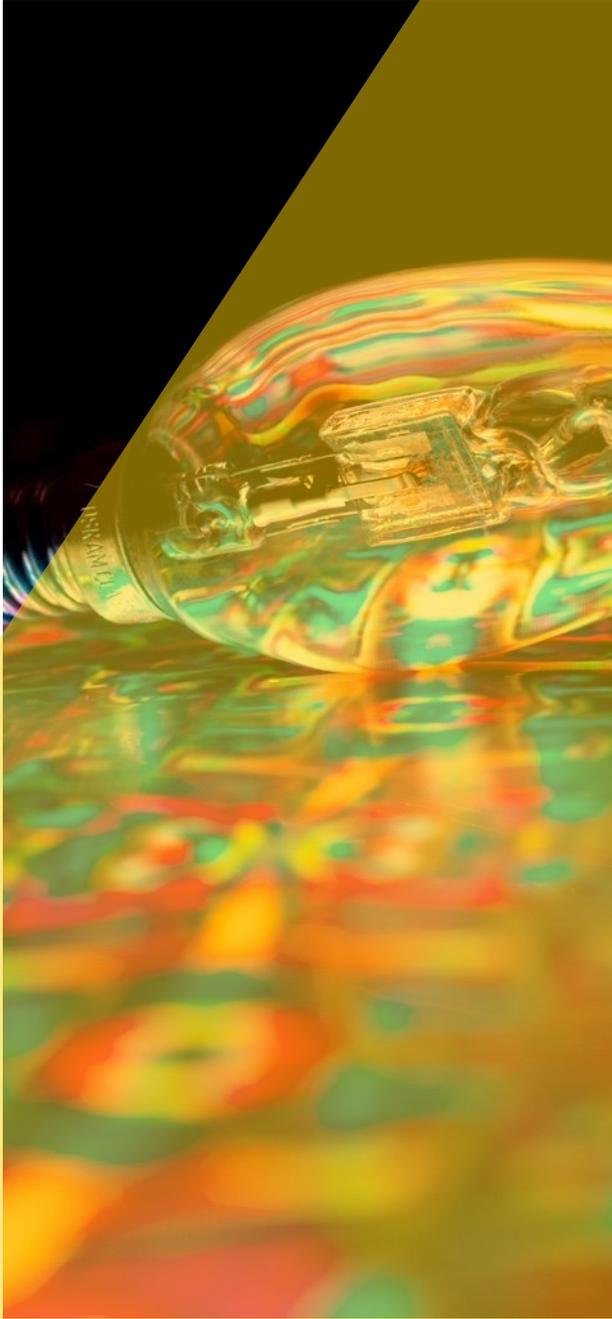


OUR DATA REVEALED...

- 60%** believe the discussion around nationality is toxic
- 56%** believe Great Britain needs a rebrand for a more positive nation
- 48%** Yet... nearly half 48% believe Britain has a positive reputation around the world
- 41%** Whilst 41% disagree that the United Kingdom should be broken up into the four nations, 32% of Brits agreed. And whilst only 22% of 18-24s believed the UK should stay united this rose to 72% of those aged 65+

WHAT CAN BUSINESSES DO TO SUPPORT THE IMAGE OF BRITAIN, BOTH AT HOME AND ABROAD?





CONCLUSION

Our hope is that Starcom's five Trends for 2022 will spark some ideas, raise some questions, and even perhaps challenge some established thinking. The future has never been easy to predict and that is more true today than it has ever been. But at Starcom we believe that smart, fast, brave decisions are key to brand success and this can only be achieved by asking the tough questions and looking honestly at the world we live in.

We would love to share and discuss these themes on resilience with you so if you would like more information on our trends and our trend data please contact:

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