



Starcom

# Forces of Change

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And Their Impact on the Human Experience in 2021

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# Introduction

In February 2020, Starcom issued our inaugural Forces of Change report. Our aspiration was to examine the powerful dynamics (whether cultural, economic, or stemming from media or technology) that would have a profound impact on the year ahead. Little would we imagine how much our world would change in a short period of time.

This year, we believe that some Forces of Change from 2020 will continue. Our relationship with health and self-care continues to be at the forefront and may be changed forever. And new forces have emerged as well, as the virtual world now plays such a central role in our lives.

At Starcom, we believe there is an increasing gap between what people want and what brands need for business success. We call that gap the “**tension**” that sits between brands and people. In this report, we are looking at the Forces of Change through the lens of those tensions (see right).

This year, we’ve also tapped into Starcom’s Human Network for insights on how they’re experiencing Forces of Change in 2021. Our Human Network is an always-on community of thousands of Starcommers globally who share their insights, passions and perspective to inform client briefs, growth insights and agency thought leadership. It is just another way we continue to deepen our understanding of people and what’s important to them at the pace of culture.

As our world remains complex, volatile and disrupted, we will continue to assess Forces of Change impacting people and what this means for brands in the months to come.

## Examining Forces of Change Through the Lens of Tension

In our work across virtually every category vertical and hundreds of brands, we have identified 11 fundamental sources of tension that cause friction between brands and people. This year, we are focusing on the top six tensions we believe are most profoundly impacting the relationship between people and brands – whether decreasing tension or increasing tension.

### Decreasing Tensions

#### Inertia / Avoidance

People don’t want to change their habits or routines

#### Utility / Convenience

People don’t think you are worth the effort

#### Lack of Desire

People aren’t interested in you

### Increasing Tensions

#### Lack of Trust

People don’t believe you

#### Unmet Expectations

People don’t think you are good enough

#### Price / Value

People don’t think you are worth the cost



— TENSION —

**Forces of Change**  
*Decreasing the*  
**Tension between**  
**People & Brands**



## Extreme Pivots, Disrupted Consumer Journeys

*Change is now the norm and staying the same is seen as weakness*

We've experienced a decade in a year. What was once deemed impossible or resisted, has been embraced in our pandemic world. Brands have entered surprising new markets and adapted in radical ways to survive and thrive in our world. People have also adapted – bedrooms became offices, garages became gyms, parents have become teachers and neighbors have become pod-cohorts.

One profound area of disruption has been the consumer journey. Retail is no longer about discovery it's about fulfillment. On-demand at-home delivery is a must for survival. Innovations in contactless payment advanced quicker than most brands had infrastructure for. With the continued escalation of e-commerce and technology enablement, people will continue to turn to brands as they seek novel experiences, putting brands even more firmly in control of the consumer journey.

**58%**

Of Starcom's Human Network have engaged with a company, brand, product or service in a completely different way than we used to.

**67%**

Of Starcom's Human Network have radically changed how they purchased a product



### **Primary Tension Force of Change Touches:**

People don't want to change their habits (routines/inertia)



### **What's happening with the tension?**

It's decreasing. People and brands are getting more comfortable and fluent with radical change.



# Extreme Pivots, Disrupted Consumer Journeys

*Change is now the norm and staying the same is seen as weakness*



In January 2021, American Airlines launched [Flagship Cellars](#), an exclusive, at-home wine club experience featuring wines from around the world.



Telemedicine leaped forward seven years in seven months. [Telemedicine accounted for 20% of all medical visits in 2020 and the projected financial value of telemedicine is projected to be \\$106B by 2023.](#)



As brick & mortar retail falls and e-commerce booms, property owners are pivoting. The world's largest mall owner is in talks with Amazon to repurpose some of its [shuttered department stores into Amazon fulfillment centers.](#)



# Wellness is Everywhere & Everything

*...and soon it will be cluttered & regulated*

People are more focused on wellness and self-care than ever before. From mindfulness and meditation apps to a surge in at-home fitness brands to organic meals delivered to your doorstep, how we fuel and care for our bodies and souls has never been more front and center. And how we are defining wellness and what fits into that category has broadened. With virtually anything and everything contributing to our wellness and ability to cope with our current existence, any brand can be a wellness brand.

From content to innovative partnerships, brands should be considering wellness as their next great opportunity. While wellness might be everywhere and everything, it will soon be cluttered, and certain areas might become regulated. Consider if your brand has an authentic brand need to be in the wellness space and what value you are bringing to people needing to feel well – emotionally, physically, spiritually.



Our Human Network indicates a strong embrace of new wellness behaviors in the last 12 months.



#### **Primary Tension Force of Change Touches:**

People don't think it's worth the effort (utility/convenience)



#### **What's happening with the tension?**

It's decreasing as it relates to wellness offerings – people are ripe to adopt new behaviors, put in the effort or buy new products.



# Wellness is Everywhere & Everything

*...and soon it will be cluttered & regulated*



There were [3.9 million downloads of the Calm app in April 2020 alone and today the app company is valued at \\$1B](#). With partnerships with actors, athletes and platforms like HBO Max, Calm is converging mindfulness and entertainment.



In early February, at-home fitness leader [Peloton reported](#) quarterly sales growth of 128% and raised its full year revenue projection to \$4B. The company faces considerable supply chain pressures as it seeks to keep pace with demand.



The global wellness market is [valued at over \\$4.75 trillion](#). Experts see particular areas of expansion in corporate wellness, sleep wellness, digital wellness, beauty + diet connection, sexual wellness, immunity and more.



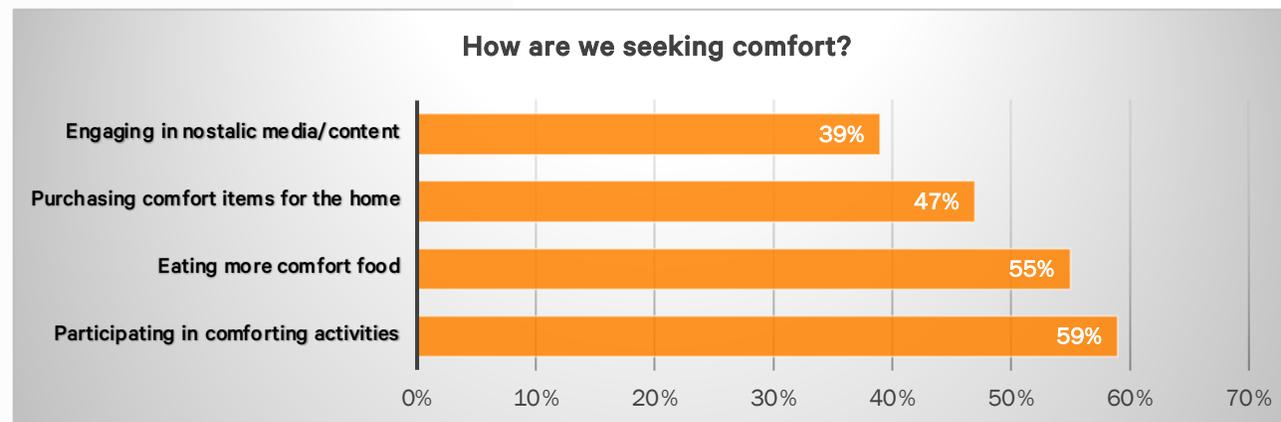


## The Currency of Comfort

*From permitted to preferred to premium and post-worthy, comfort is luxury*

During this time of uncertainty, fragility and isolation, we have seen a huge increase in people seeking out overt comforts to soothe themselves. This includes what they wear, how they cultivate their home environment or seeking comfort in fresh air and nature.

Being comfortable at work in our “remote working” world is preferred and pushed Smart Casual to new limits. In the kitchen, people have turned to baking and comfort foods to sooth. Luxury weighted blankets are helping people stay warm, while also helping with anxiety. With comfort being the new luxury, brands should consider how they too can bring comfort to people in ways big and small – whether to entertain, relax, beautify, nourish or beyond.



Starcom’s Human Network is seeking comfort in myriad ways. Additionally, 73% of us indicate that we have invested in more comfort wear in the past 12 months.



### **Primary Tension Force of Change Touches:**

People aren’t interested in it (lack of desire)



### **What’s happening with the tension?**

It’s decreasing. People haven’t historically coveted comfort items; these comfortable and familiar items have never elicited passionate desire (like high fashion and luxury). The importance of comfort in COVID times has reframed that fundamental equation.



# The Currency of Comfort

*From permitted to preferred to premium and post-worthy, comfort is luxury*



The sleepwear and loungewear market is [expected to grow by \\$19.5B between 2020-2024](#).



Out with the jeans, in with the leggings. [Denim sales fell sharply in 2020](#); denim retailers like Lucky Brands and True Religion filed for bankruptcy.



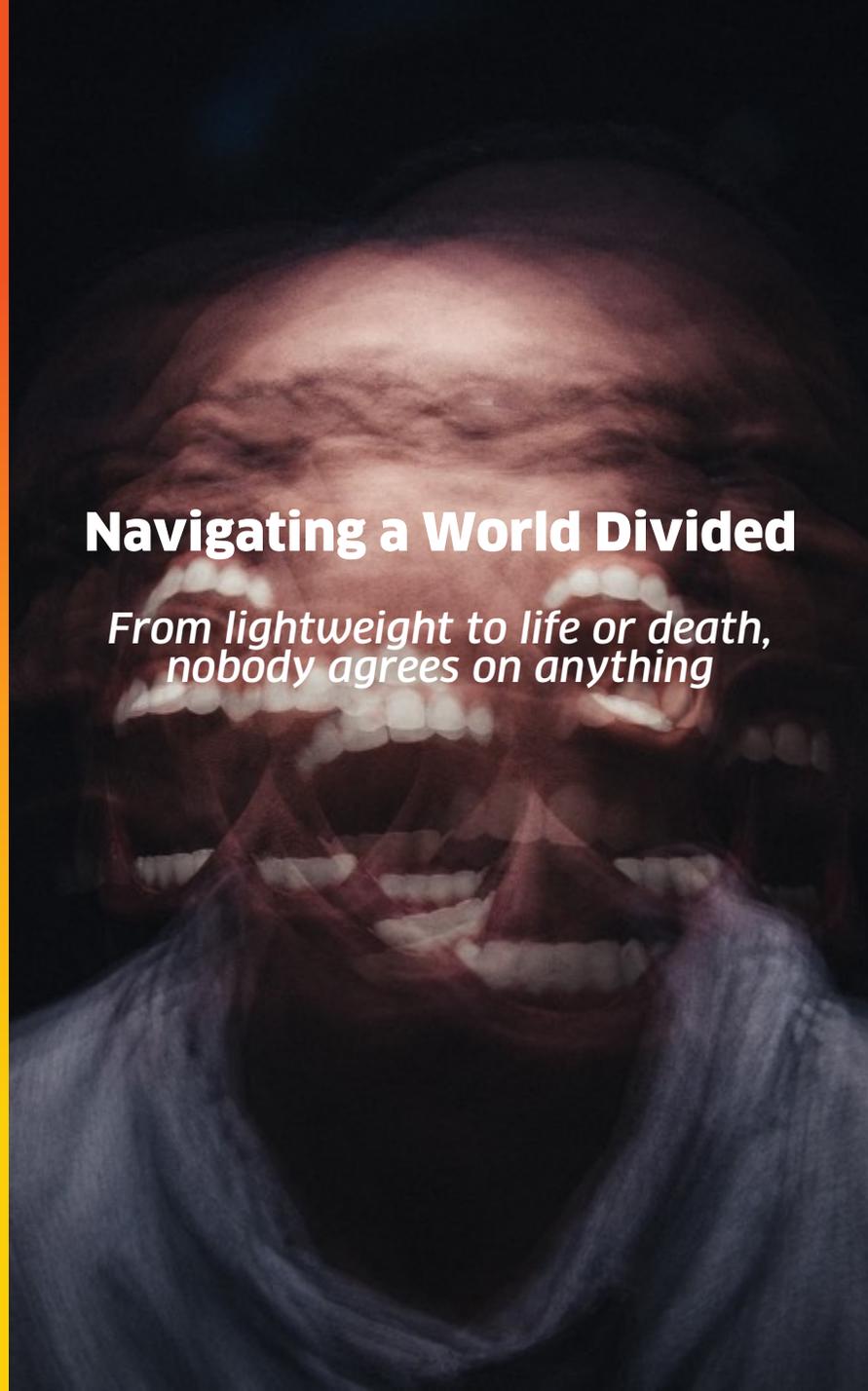
Whether staying comfortable at-home or warm while dining and socializing outdoors, [blankets have become the pandemic era's must-have fashion accessory](#).



— TENSION —

**Forces of Change**  
*Increasing the*  
**Tension Between**  
**People & Brands**



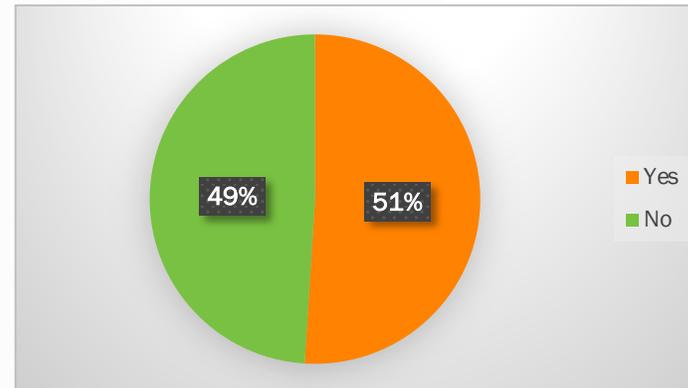


## Navigating a World Divided

*From lightweight to life or death,  
nobody agrees on anything*

The perfect storm of disinformation, political turmoil, racial reckoning, climate crisis and economic downturn have brought the vast disparities that exist in culture into even sharper focus. And this divide extends far beyond current events with core beliefs, values and expectations all divided...we can't ignore that globally we aren't talking to people who feel the same way about things. Even trivial things like one's favorite celebrity, entertainer, preferences in sports are experienced through a highly personal lens. We can't help but feel like we'll never be back to a place where we can agree on anything.

So how are brands supposed to navigate this divided world? Don't attempt common ground. It's diluted and lowest common denominator. Think about where you can authentically take a stand and/or consider myriad partnerships that speak to your diverse audience.



*% if us who feel there is a topic too sensitive or controversial to discuss with close friends/family members*

**Starcom's Human Network was divided about being divided.**



### **Primary Tension Force of Change Touches:**

People don't believe it (Lack of Trust)



### **What's happening with the tension?**

It's increasing and accelerating dramatically. In our divided culture, trust in institutions, the government, brands and even other people is under siege.



# Navigating a World Divided

*From lightweight to life or death, nobody agrees on anything*



[Ben & Jerry's doubled down on its position as a leader in brand activism in 2020](#), taking hardline stances on the US election, social justice, climate change and more. Staying silent was not an option.



[Edelman's Annual Trust Barometer](#) called 2021 the era of "information bankruptcy" with trust in brands, leaders, NGOs and governments at an all time low.



[When promoting Paramount+ during the Super Bowl](#), Paramount smartly realized it needed to reach people across demographics, & interests. Whether you were a sports fan or Star Trek fanatic, into RuPaul's Drag Race or Dora the Explorer, the spot featured a little something for everyone.

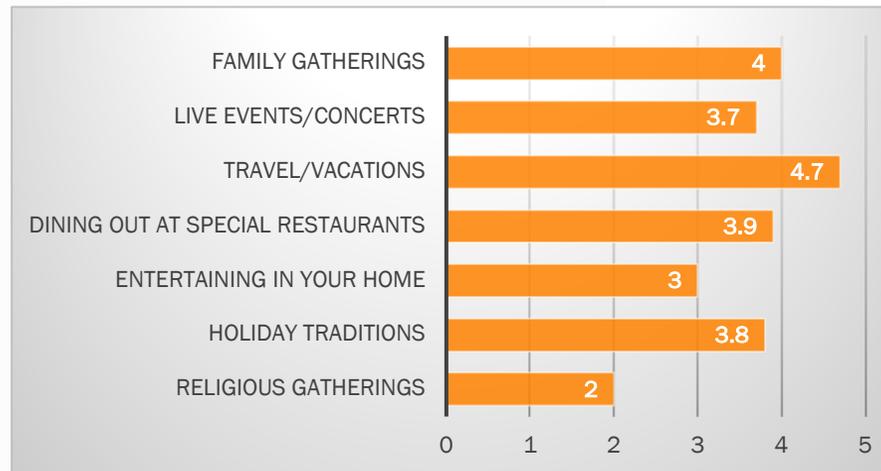


## Desperately Seeking Sacred Time

*Life is about what you love and what's in the way. Understand your brand's role in both.*

People are craving “sacred” time and carving their own path to create it in our pandemic world. Sacred time is the time we anticipate, experience deeply and remember forever. Traveling to new lands. Celebrating milestones and occasions. Seasonal and holiday rituals like back-to-school and Halloween. A dinner with lifelong friends you don't see as often as you would like.

From Zoom birthday celebrations to micro-weddings, people are desperately trying to create sacred time in our pandemic times. While we've created and adapted to virtual sacred time in our new world order, we've missed other kinds of sacred time that just can't be recreated. Brands should consider how they meet people on this desire line, helping fulfill the ultimate “people want” of sacred time.



**When asked to rank what types of “sacred time” they are missing most, our Human Network is missing travel above everything else.**



### **Primary Tension Force of Change Touches:**

People don't think it's good enough (Unmet Expectations)



### **What's happening with the tension?**

It's increasing. We have basic human needs for sacred time that are currently going unmet. The longer our pandemic life goes on, this tension will continue to accelerate.



# Desperately Seeking Sacred Time

*Life is about what you love and what's in the way. Understand your brand's role in both.*



One of the world's most trusted travel tour operators, [Rick Steves](#), is hosting a live Monday Night Travel Party. Each week he features a favorite European destination, treating viewers to an hour of virtual travel time.

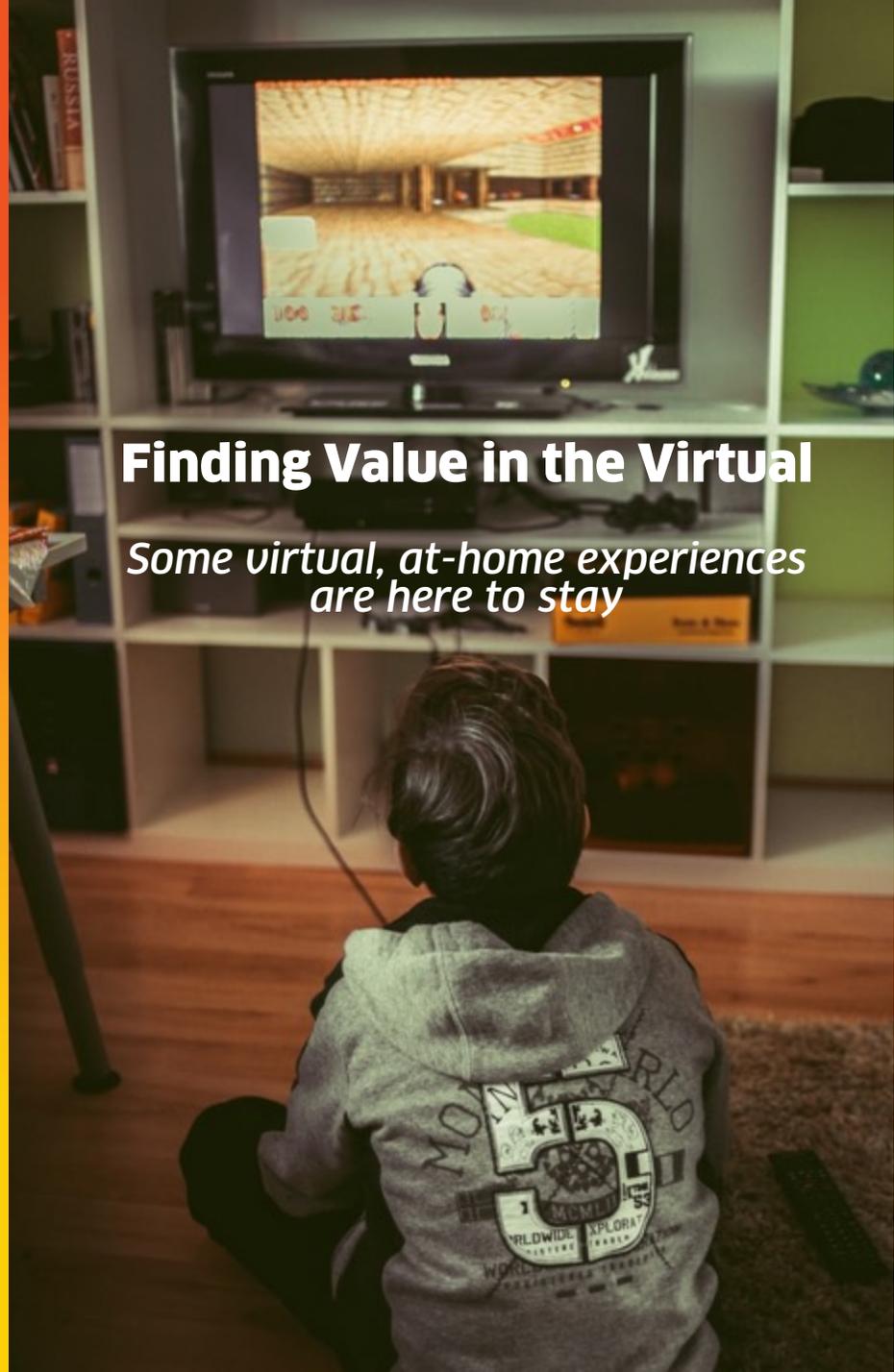


One of Singapore's top destinations, [Sentosa Island](#), created a first of its kind virtual destination on the Nintendo game Animal Crossing: New Horizons, enabling players to visit and interact with its many amenities.



Home improvement retailer Lowe's wanted to help families create some Halloween magic and created curbside trick or treating, complete with costumes, candy and pumpkins.





## Finding Value in the Virtual

*Some virtual, at-home experiences are here to stay*

As we've reluctantly moved into this virtual world we've discovered that virtual actually makes some things better. Getting to be face-to-face with global work colleagues without the jet lag. Watching a keynote address with a virtual front row seat while you prep dinner at home. Going to a virtual charity event without having to wear a tuxedo. We could go on.

At-home technology and content providers will only further enable the at-home experience and people will increasingly find value in the virtual. We see this playing out in three ways: high value content accessed easily from home, real-life events scaled to your home and digital goods sold to deepen your engagement with a technology platform accessed from home or on a device (think gaming).

When will people be ready and comfortable to engage in IRL experiences and how will they value it? Time will tell. But as technology continues to allow, we can expect that some of these virtual experiences will be here to stay.



**Starcom's Human Network reports that most virtual experiences have been better than expected.**



**Primary Tension Force of Change Touches:**  
People don't think it's worth the price/value



**What's happening with the tension?**  
It's increasing. Now that we've realized virtual can work, people will think carefully about what they are willing to pay for live experiences.



# Finding Value in the Virtual

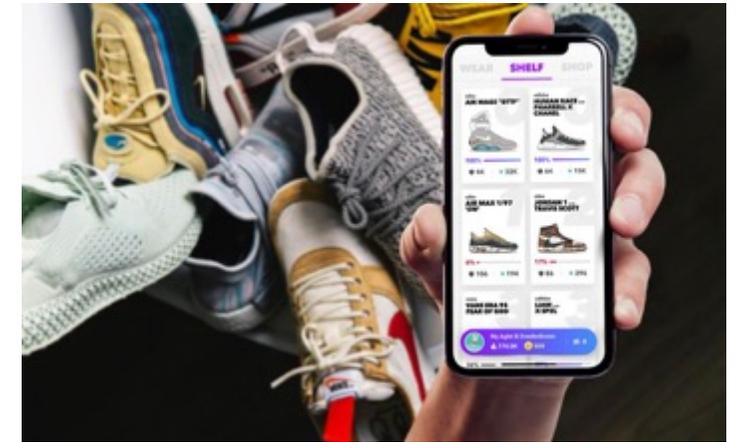
*Some virtual, at-home experiences are here to stay*



People watched the premier of anticipated feature film “Wonder Woman 1984” from the comforts of their home on HBOMax. [Nielsen estimates that WW84 was viewed 14.9 million times.](#)



Instead of watching the newly elected President & First Lady attend inauguration balls, people were treated to [a star-studded primetime “Concert for America” on Inauguration Day.](#)



[People are spending thousands on digital sneakers](#) and other accessories that can only be worn in certain games or social platforms.



# Implications

# Implications for Brand Marketers

There are three questions every marketer should excitedly ponder to fully leverage these Forces of Change. Regardless of your category or product. No matter your maturity, challenger or leadership status.

- What is your wellness strategy? Every brand is a wellness brand within the current scope of people's desires.
- What is your D2C strategy? Every brand can and should own more of the consumer journey than ever before; regardless of established institutions.
- What is your virtual strategy? Every brand needs to understand how they connect what they offer physically to what they offer virtually.



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The Human Experience Company