

TOP TRENDS



2021 NOW & NEXT

TOP TRENDS 2021 – NOW & NEXT OVERVIEW

As the second pandemic year, 2021 was characterized by resilience, reprioritization, and reactions. Americans made shifts in their lives to prioritize better work/life balance, time with loved ones, and overall wellbeing. Beyond mere acknowledgments in 2020, values were supported with more tangible actions. Environmentally sustainable behaviors have become more mainstream and brands are making moves for greater diversity, equity, and inclusion in response to consumer demand. While the real world began to reopen more than the previous year, the virtual world also expanded with the broader adoption of NFTs, attention for cryptocurrency, and the introduction of the metaverse. The trends of 2021 have varying projected staying power, but all are likely to continue into the start of 2022 and many will shape the long-term future.



GENERAL TRENDS

1. Brands as Citizens
2. Great Reprioritization
3. Inclusion in Action
4. Sustainability is in Style
5. Digital World and Social Currency

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BRANDS AS CITIZENS (NOW – NEAR TERM)

As a convergence between the existing trends of demand for business good and a rise in localism, we are now seeing brands engage as community members. In addition to the pandemic, 2021 brought local community-specific natural disasters and violent tragedies, giving businesses both big and small the opportunity and imperative to act. Consumers are looking to businesses to have a positive impact on society, starting in their own backyards, and are rewarding those who align with their values.

73%

73% of global respondents believe brands must act now for the good of society and the planet.

- HAVAS MEDIA GROUP

69%_{LEFT} 70%_{RIGHT}

69% of left-leaning and **70%** of right-leaning consumers are willing to forgo the convenience of online ordering to shop at local small businesses.

- AFLAC

2/5

More than **2 in 5** women under 40 want to buy from companies that use a percentage of their profits to help local communities.

- THE HARRIS POLL

77

The Waukesha County Community Foundation shows **77** organizations and businesses have had or will have their own fundraisers to benefit The United for Waukesha Community Fund, a fund organized to benefit the victims of the Waukesha Christmas Parade tragedy.

- MILWAUKEE JOURNAL SENTINEL



GREAT REPRIORITIZATION (NOW – MEDIUM TERM)

After a continued rollercoaster of unemployment and health concerns, Americans are doing more than just quitting their jobs, but are reprioritizing their lives and acting on their own major shifts. During this shuffle, job vacancies delay society from a rapid return to pre-pandemic growth. However, whether starting businesses, adjusting to a more flexible work arrangement, or simply focusing more on bettering themselves and others, the great reprioritization is a sign that positive change often happens amidst major disruption.

4.3MM

4.3 million people (or nearly **3%** of the workforce) quit their jobs in the U.S. in August - the most on record.

- AP NEWS

CLOSE TO A QUARTER
(23%) OF EMPLOYED
AMERICANS PLAN TO
QUIT THEIR JOBS IN
THE NEXT 12 MONTHS.

- THE HARRIS POLL

89%

A large majority (**89%**) of startup entrepreneurs say that the pandemic has presented new innovative opportunities for their businesses.

- THE HARRIS POLL

49%

Around half of Americans report that they are prioritizing a better work life balance (**49%**).

- IPSOS

76%

Americans report lifestyle changes to serve their own betterment and that of society;

(76%) will continue to support charities they donated to this year due to the pandemic in the future

43%

(43%) plan to stay more connected to friends and family after the pandemic

42%

(42%) plan to stay more physically active.

- THE HARRIS POLL

81% 86%

81% of Gen Z and **86%** of Millennials say the pandemic has made them re-evaluate what is important in their life.

- KANTAR U.S. MONITOR



SUSTAINABILITY IS IN STYLE (NOW – LONG TERM)

As climate change continues to be a looming concern over society, consumers are increasingly welcoming sustainable practices into their lifestyles. Once niche behaviors, buying electric vehicles and participating in sustainable fashion practices are just a few of the eco-friendly choices that are in style and broadly accepted. Vegetarianism is also gaining traction as an environmentally conscious lifestyle in the high-end foodie space showing that it is here to stay.

66%↑72%

66% of all respondents express some anxiety about how climate change will affect them personally, rising to **72%** of Gen Z.

- WUNDERMAN THOMPSON

The secondhand market is projected to reach **\$77 billion by 2025** — up from \$36 billion in 2021 — and is growing at 11x the rate of the broader retail clothing sector.

- YAHOO! NEWS

Madewell has opened its first secondhand store

- TRENDWATCHING

59%

59% of women agree that “shopping online is often wasteful with its packaging,” and **56%** agree “I’m staying away from fast fashion because it’s unsustainable.”

- THE HARRIS POLL

Foodie culture sacrifices meat-based menus in favor of sustainable consumption.

“Michelin star restaurant in New York ditches meat and goes plant-based”

- FOOD & LIVING VEGAN

1/2

Already half (**51%**) of US adults would consider buying an EV.

- THE HARRIS POLL



INCLUSION IN ACTION (NOW – LONG TERM)

As an ongoing effort to improve society, diversity, equity and inclusion will remain imperative themes in our culture for years to come. Far beyond the early days of DEI work being seen as bonus initiatives, equitable and inclusive solutions that represent all people are now seen as foundational in brands' offerings. As a result, brands have shifted from a phase of avowals to actions and are redefining cultural norms.



12B

In the U.S., Biden is funneling over **\$12 billion** into disability services.

- TRENDWATCHING

52%

52% of corporate directors support tying executive compensation to DEI goals.

- PWC SURVEY VIA FORTUNE

“Target’s Teaming up with Diverse and Women-owned Businesses to Reimagine Beauty and Personal Care Products”

- TARGET CORPORATE

Luxury brands are re-inventing themselves to appeal to younger and more diverse audiences:

Tiffany’s new campaign with Beyonce and Jay Z is geared towards younger and more diverse consumers with familiarity highest among African Americans **(66%)**, Asian Americans **(67%)**, and Millennials **(72%)**.

- THE HARRIS POLL

Citizen Watches currently uses tennis star Naomi Osaka as a brand ambassador and among Gen Z and Millennials, Citizen has steadily improved in its perception as a fun, hip, and bold brand.

- THE HARRIS POLL

DIGITAL WORLD AND SOCIAL CURRENCY

(NOW – LONG TERM)

After experiencing a home-bound world in 2020, our culture is adopting a more limitless world through digital technology. Digital assets such as NFTs and cryptocurrencies continue to gain popularity while gaming platforms and social media companies build out the possibilities of virtual worlds and the metaverse. Brands can look for ways to get in on the action and reach consumers in a meaningful way digitally and in real life.

75%

A vast majority (**75%**) of parents with kids aged 3-9 say they have more screen time now than they did last year.

- MORNING CONSULT DATA IN AXIOS

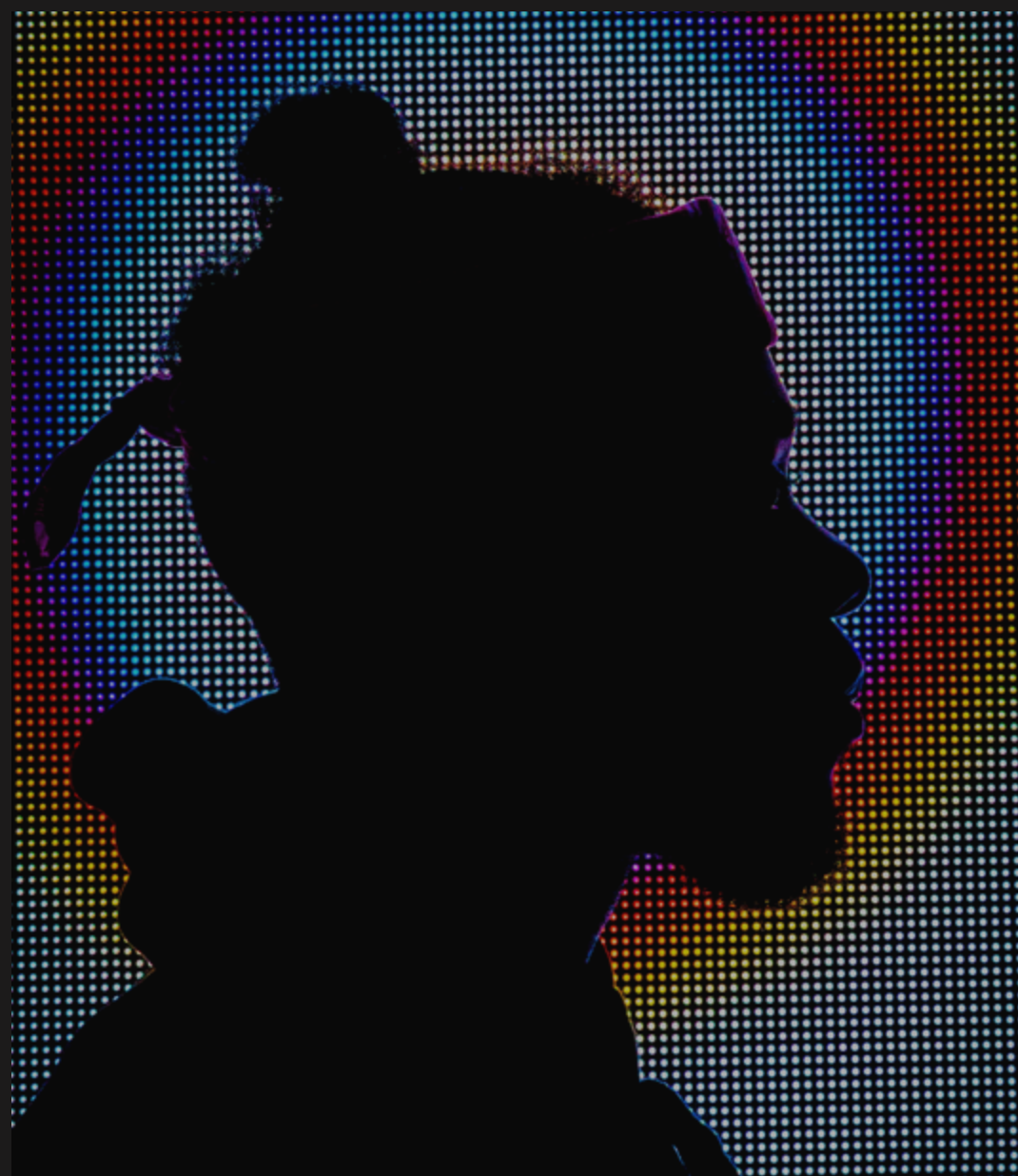
Gaming platform Roblox has become one of the most popular platforms for young kids. TikTok has become one of the hottest social apps, especially among older kids.

- MORNING CONSULT DATA IN AXIOS

48%

Nearly half (**48%**) of U.S. consumers reported investing money in cryptocurrency during the first half of the year.

- BUSINESS WIRE



22.5M

Robinhood had **22.5 million** active users in 2021 as trading cryptocurrency for hobby continued its popularity.

- BUSINESS OF APPS

7/10

7 in 10 (70%) Gen Z and Millennials are interested in interacting within the metaverse (vs **32%** of those over 40.)

- THE HARRIS POLL

Marriott International has released three art inspired NFTs at the Art Basel Miami as part of the Marriott Bonvoy rewards program.

- MARKETING DIVE

HEALTHCARE

1. Vaccination Conversation
2. Mental Health as Overall Health
3. Intentional Intake
4. Healthcare Entrants for All
5. Telehealth Transforming Healthcare

HEALTHCARE NOW & NEXT OVERVIEW

As a positive outcome of the pandemic, health and healthcare have been in the societal spotlight. This has highlighted the ongoing importance of mental health and intentional diets as integral aspects of overall health. It has also opened conversations about who is involved in healthcare, from public policy and employers involved in vaccine mandates, to external organizations expanding into healthcare offerings. Throughout the past year and looking ahead, the healthcare industry continues to innovate and evolve to people's concerns and needs in an effort to improve society's overall wellbeing.



VACCINATION CONVERSATION (NOW – NEAR TERM)

With the pandemic evolving and new variants emerging, vaccination continues to be a moving target. This key topic of conversation ties into health of all ages, from children to seniors, as well as operational concerns from workplace requirements to public policy. Healthcare providers and payors are impacted not only in the distribution of vaccines, but also as they navigate their own implications as employers facing worker shortages with questions on vaccine mandates.

71%

Approximately **71%** of the US population has received at least one dose of the COVID-19 vaccine.

- CDC

1/2

Now that boosters are recommended for all, half (**50%**) of respondents consider vaccination plus booster to be “fully vaccinated.”

- THE HARRIS POLL

New York City Mayor, Bill de Blasio, has announced a vaccination mandate applying to all private employers, the first of its kind in the nation, effective December 27.

- CNN

Organizations have the opportunity to incentivize vaccination.

In 2019, **\$783** per year was the average maximum incentive offered by employers for workers to participate in wellness activities.

- THE CONVERSATION

In 2021, Missouri State University offered **\$20** per month discounts on health insurance premiums for employees who got a COVID-19 vaccine.

- THE CONVERSATION

Healthcare employers are faced with challenges of vaccine requirements and worker shortages.

Nearly 1/3 of U.S. healthcare workers in hospitals were unvaccinated as of Fall 2021, up to **37%** in non-metropolitan rural counties.

- HEALTH DAY NEWS

“VACCINE MANDATE
SPARKS RURAL
HEALTHCARE
STAFFING CONCERNS”

- U.S. NEWS & WORLD REPORT



MENTAL HEALTH AS OVERALL HEALTH (NOW – LONG TERM)

The pandemic not only brought to light the fragility of our society's physical health – it also raised mental health's importance and the interconnection between the two. Societal and sports-culture pressures put these conversations in the spotlight creating a promising path towards future improvement across all groups, including racial minorities who may experience a greater impact. In response, employers are leaning on health insurers and providers for expanded mental health services.

54%

Fifty four percent of Americans say there is significant room for improvement in addressing mental health and suicide crises, which is far higher than other medical emergency responses where only **26%** of Americans report significant improvement is needed at the macro level.

- IPSOS

Athletics offered a platform for mental health awareness. In the 7 day period surrounding their own testimonies, Simone Biles gained 2 million interactions and Naomi Osaka gained 1.2 million.

- AXIOS

32% VS. 22%

Black and Hispanic Americans (**32%** each) are more likely than white Americans (**22%**) to say they think about their mental wellbeing often.

- IPSOS

31%

31% of employers have expanded the ways through which enrollees could get mental health or substance abuse services.

- KAISER FAMILY FOUNDATION REPORT

The good and the bad brand players in mental health

“Facebook Knows Instagram Is Toxic for Teen Girls, Company Documents Show”

- WALL STREET JOURNAL

“CDC: ER visits for suspected suicide attempts among teenage girls rose during pandemic”

- THE WASHINGTON POST

“Lush Cosmetics to quit social media amid growing mental health concerns”

- CNN



INTENTIONAL INTAKE (NOW – LONG TERM)

Shifting consumer tastes and values have highlighted new diet and lifestyle choices that are likely to last. The conversation around diets' inextricable connection to health shows healthcare payors and providers' expanded scope and opportunity to adapt with current health trends and create nutrition-based offerings to improve overall health and reduce health costs.

40%

Higher intake of ultra-processed foods was associated with a two-thirds higher risk for a second and fatal heart attack or stroke, as well as a **40%** higher all-cause mortality risk, compared with lower consumption levels.

- HEALTHDAY NEWS

30%

The U.S. market for no- and low-alcohol drinks grew by more than **30%** in terms of volume last year.

- MARKETING BREW

\$200

A Health Affairs study found that programs designed to help patients meet basic nutritional needs can achieve a monthly net healthcare savings of up to **\$200** per patient.

- MCKINSEY & COMPANY

1/10

1 in 10 Americans (**11%**) say vegetarian best describes their regular approach to eating. Up to **19%** of Millennials and **17%** of Gen Z.

- KANTAR US MONITOR

55%

55% of Medicare Advantage plans in 2021 offer home-delivered meals or food and produce benefits.

- MCKINSEY & COMPANY



HEALTHCARE ENTRANTS FOR ALL (NOW – LONG TERM)

As health and healthcare become a greater priority across culture and consumers increasingly seek easier, more ‘consumerized’ healthcare experiences, brands within and outside of the industry are collaborating. This provides fresh perspectives, resources, and competition within the broader health space, shaking up the industry by offering new ways for consumers to access healthcare. These new entrants and partnerships point to a reformation of the healthcare industry, one that includes broader reach to underserved populations.

9,000

Walgreens announced plans to offer doctor’s appointments, medical tests and nurse advice from their **9,000 stores**.

- CNBC

CVS Health signed a deal with Microsoft for cloud computing services, access to Microsoft’s Teams videoconferencing platform, Azure task automation technology and development of more customized care based on CVS customer and insurance subscriber data.

- FORBES

Anthem Blue Cross and Blue Shield is partnering with Kroger and Medicare Advantage plans to provide members with in-store benefits at Kroger locations.

- BECKER’S HOSPITAL REVIEW

78%

78% of healthcare leaders see Amazon as at least a moderate threat to hospitals and health systems.

- KAUFMAN HALL: STATE OF CONSUMERIZATION IN HEALTHCARE 2021

Amazon continues its expansion into healthcare with an accelerator aimed to “cultivate and promote innovative startup solutions that achieve the Quadruple Aim of improved patient experience, improved clinician experience, better health outcomes, and lower cost of care.”

- FORBES

Consumers are looking for their healthcare encounters to be easier, more streamlined and to look more similar to their interactions with other brands:

53%

Positive online reviews were the No. 1 factor influencing consumers’ choice of providers

53% of consumers want to be able to schedule same day appointments

32% of consumer want to look up cost estimates online

- PRESS GANEY CONSUMER EXPERIENCE TRENDS IN HEALTHCARE 2021

32%



TELEHEALTH TRANSFORMING HEALTHCARE

(NOW – LONG TERM)

Health technology took leaps forward driven by pandemic-induced necessity. New tools and virtual care are transforming the healthcare space for the long run, as both new and old healthcare practices will work together. The ecosystem of healthcare offerings will continue to evolve as optimization is needed to address existing barriers and concerns.

91%

91% of medical providers surveyed say they have already started using telehealth, **44%** having started after the pandemic began.

- MHEALTH INTELLIGENCE

52%

52% of telehealth providers reported having patients who refused a virtual visit, citing mistrust in technology or concerns about privacy and data safety.

- MHEALTH INTELLIGENCE

92%

92% of physicians surveyed believe technology can have a positive impact on improving patient experiences.

- GOOGLE CLOUD SURVEY WITH THE HARRIS POLL

72% 55%

Telehealth provides a compliment to in-person care. The proportion of post discharge follow-up visits conducted in person dropped from **72%** to **55%**, while the proportion of telemedicine visits rose from **0%** to **46%**.

- MHEALTH INTELLIGENCE

71%

71% of provider respondents believe that telehealth will add the most value to the healthcare sector in the next five years as compared with any other technology.

- MHEALTH INTELLIGENCE

83%

83% of respondents agree that five years from now telehealth will be a common way that people see their doctors for routine healthcare.

- KANTAR U.S. MONITOR





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