

After Right Now

Exploring the new realities
for brands & consumers in
the COVID-19 era



BENSIMON BYRNE

ONEMETHOD

NARRATIVE

2020 - 04 - 02

A RETURN TO
NORMALCY AWAITS US,



BUT WHAT WILL THE
NEW NORMAL BE?

We are in the midst of a world-altering event...

A return to normalcy awaits us, but what constitutes normal will be drastically different than what we know today. History shows that events of this magnitude mark the end of one era and the beginning of the next.

In pandemic terms, the Spanish Flu of 1918-20 was a catalyst for social upheaval. In modern times, the reverberations of 9/11 are still felt today. COVID-19 will be no less impactful on our lives. In this document, you will find our first effort to anticipate the implications for marketers and their brands in the era that will come after right now.

What follows is organized around three assumptions

1 TIMEFRAME How the next 3-18 months look

We focus largely on the next 3-18 months (the COVID-19 era) spending less time in the next 90 days (already extensively covered) and anything approaching two years away (too distant to map).

2 GENERAL IMPACT How 4 areas of our world will change

We present our thinking within 4 distinct yet interrelated areas of interest: New Economic Realities, Macro-Societal Trends, Consumer Psychology, and Politics & Civil Liberties.

3 SPECIFIC IMPLICATIONS What it means for brands & consumers

We filter the emerging shifts through the lenses of two consumer demographics (age and income), in addition to mapping the potential impact on marketers and the brands they work with.

Table of Contents

What's Now

0 - 3 MONTHS

An overview of the
next 90 days

What's Next

3 - 18 MONTHS

An exploration of the
COVID-19 era

- New Economic Realities
- Macro-Societal Trends
- Changing Psychology
- Politics & Civil Liberties

What's Near

18 MONTHS ONWARD

A spectrum of speculations
on the future

But first, some history

To look beyond the obvious, we first must look at historical analogues for clues. From there, we explore what risks and opportunities may present themselves for consumers, businesses and the global community in a post-pandemic world.



The Spanish Flu, 1918



9/11 Attacks, 2001

The Spanish Flu

From 1918 to 1920, the Spanish Flu — an unusually deadly influenza pandemic — infected half a billion people worldwide and killed anywhere from 20 million to 50 million people. Though developments in healthcare will, thankfully, limit casualties of COVID-19, the global interconnectedness of the Spanish Flu and its role as a catalyst for change make it a useful analogue.

WHAT HAPPENED THEN

A catalyst for universal healthcare



Disadvantaged segments were hit hardest



Helped end hostilities in World War I



Waves of worker strikes



Increased equality & independence movements



WHAT MAY HAPPEN NOW

Because infectious diseases required a population-level response, a cognitive shift about healthcare began in the 1920s. COVID-19 may spur improved healthcare across Africa, for example, as, in a pandemic, global health is only as strong as the weakest link.

Inequality of privilege may lead to challenges to authority and significant social upheaval. A phenomenon that may increasingly shape politics in 2021 and beyond, potentially in the form of a push for universal income-type policies.

An international unification to combat the joint goal of battling the pandemic could tame certain international conflicts — some temporarily, some permanently.

A shift in the balance of power back to workers or unions, for example, with underprotected workers unifying to demand health benefits or pension plans.

A shift in the balance of power back to the people and a strengthened push for equality, especially in regions where some groups fared materially worse than others.

The 9/11 attacks

The attacks of September 11 left a permanent imprint on American society and the Western world at large. This imprint has since shaped domestic politics and international relations, and fundamentally changed the way many Americans view the world outside their borders. Though COVID-19 is a very different type of catastrophe, it may similarly impact debates about globalization, internationalization and nationalism.

WHAT HAPPENED THEN

Permanent changes to air travel and safety



A shift in economic power to China and India



An immediate cultural impact in the U.S.



Rise of anti-immigration & Islamophobia



WHAT MAY HAPPEN NOW

A re-evaluation of global sanitation standards and procedures. For example, in the future, all travellers may be required to conduct a temperature check before boarding an international flight.

An equalization of world powers: those with more going into the pandemic have more to lose, while less-developed countries receive unprecedented aid and attention from the global community.

The “individualistic” mentality of the West may creep slightly closer to the “collectivist” mindsets of many Eastern cultures.

Globally, nations and citizens alike search for the “guilty.” Blame will be laid by many in the direction of many.

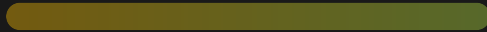
What's Now

The next 90 days

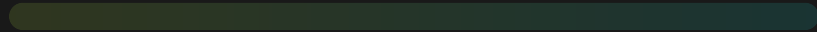
The present reality sees businesses, governments, and citizens scrambling to make sense of an unprecedented situation. Despite huge uncertainty about the future, best practices around marketing and strategy start to crystallize for businesses and brands.



NEXT 3 MONTHS



3 TO 18 MONTHS



BEYOND 18 MONTHS

THE NEXT 90 DAYS

A tremendous amount of analysis has already been done on the immediate impacts of COVID-19.

We've selected four in-depth thought pieces (to the right) to give you a good vantage point of the current situation.

We've also prepared four key takeaways (to follow).

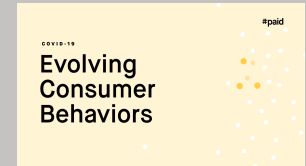
CONSUMERS: Brands and COVID

BBH



CONSUMERS: Evolving Consumer Behaviors

#paid



MEDIA: Making Communication Choices in COVID-19

Ogilvy Social.Lab



BRANDS: Advertising in a downturn

IPA



Take The Right Tone

Ensure the way you speak is appropriate for the times.

In-market and almost-in-market campaigns should be carefully examined to ensure they are not tone deaf. Do you have communications in market that invite people to come closer together? To go out and explore? Are you accidentally contradicting quickly evolving government recommendations? Are you ideating on new offerings, promotions or branded content that could be misconstrued as opportunistic? In times like these, social listening tools are a must to ensure your brand has a good understanding of our shared sensibilities within a rapidly evolving context.



Create Acts, Not Ads

Be more than a brand. Aim to be a helpful citizen.

Governments around the world are desperately seeking support from all industries in their fight against COVID-19. Alcohol companies are contributing by producing hand sanitizers; Tesla and Dyson are producing ventilators; clothing designers are making masks. If your organization has products or services that can actually help people, offer them. If your organization can re-purpose its production line to produce what's needed, do it. Acts like these will build brand equity, create the potential for profit and, ultimately, help humanity.



Don't Switch Off

Silence may drive short-term gain but compromise your future.

IPA's Advertising In a Downturn study outlines that cutting budgets in a downturn helps brands to defend profits in the very short term, but weakens them and decreases profits after they emerge from the crisis. The same study recommends maintaining share of voice at or above share of market during a downturn, as the longer-term improvement in profitability will likely outweigh greatly the short-term reduction. Finally, if other brands cut budgets, the longer-term benefit of maintaining share of voice will even be greater.



Do Go Home

Continue evolving your brand to the new at-home realities.

As people around the world are required to stay home, new consumer behaviours are emerging rapidly. These behaviours are shaping, and will continue to shape, a brand's offering, distribution ecosystems and media strategies. For example, numerous fitness centres in the GTA are retaining their client base through online fitness classes. In the U.S., Chipotle is promoting its delivery service through "Chipotle Together," a virtual lunchtime hangout, hosted through Zoom, for 3,000 fans, and featuring celebrity appearances/Q&As, exclusive content and more.



What's Next

The COVID-19 era

Our “Usable Future” is weighted most heavily by leaders in making decisions, and currently presents a complicated picture for businesses. Decision makers need to grapple with elaborate economic, societal, psychological and political factors. This section will cover each in turn.



NEXT 3 MONTHS



3 TO 18 MONTHS



BEYOND 18 MONTHS

New Economic Realities



Unprecedented & persistent unemployment

With Canada's unemployment rate already reaching new heights¹, lingering structural unemployment will stem from disruptions to businesses, with only a fortunate minority returning to pre-pandemic operating levels.

From March 16-22, 2020, the Canadian government received approximately one million EI claims², representing about 5% of the national workforce. Some businesses remain optimistic for stronger fiscal policy responses and aid packages, but if their hopes aren't fulfilled — or the global health situation deteriorates further — millions more may find themselves out of work. All signs point to this being a period of prolonged structural unemployment, and different than previous cyclical unemployment spells in Canada. The natural rate of unemployment, the baseline level supported by the economy, may change permanently.

¹ www.indexmundi.com/canada/unemployment_rate

² Globe and Mail, Unemployment claims reach nearly one million as businesses battered by coronavirus pandemic

³ BDO Canada Affordability Index, 2019

Implications

Millennials and Gen Zers looking to enter the labour force will face unprecedented hurdles. This will extend the economic impact to long after the virus is overcome.

Lower- and middle-income individuals living paycheck to paycheck (53% of Canadians in 2019³) will start going underwater and accumulating further debt, which could be a lasting strain on the economy.

Marketers will find fewer dollars and smaller teams as organizations attempt to reduce costs. They will be forced to adapt and innovate, finding new ways to propel their brands through the downturn.

Increased financial uncertainty & autonomy

Deteriorating savings and unrelenting financial uncertainty, paired with infinitely expanding online financial resources, may cause more people to take control of their own finances in order to regain a sense of autonomy.

The first financial crisis since the widespread adoption of passive investing may cause ripples throughout the world of personal finance. Depending on how much of the last decade's gains are recovered, we could see a fundamental shift back to active investing, or proliferation of alternative investing for casual investors looking for growth in the world of perma-low interest and saving rates. Beyond the strategies, the pendulum might also swing from all-digital back to face-to-face interactions to support and guide customers.

¹ Gandalf Group, COVID March 2020

Implications

Middle-aged Canadians are the group most likely to be concerned about their overall financial situation, data suggest¹. With retirement on the horizon, they have more immediate financial needs and, with families, likely have greater expenses. They may begin to seek simple and secure solutions to their new financial situation.

Marketers will, more than ever, be keeping tabs on money. They will need to have a keen understanding of the underlying shifts in personal finance, especially in relation to their category and/or product. The positioning of brands will need to reflect individual debt levels and react to the changing personal finance landscape.

Softening real estate prices

Financial dominoes will fall as higher unemployment and tighter borders soften real estate prices, possibly providing relief for potential buyers long priced out of the market.

Everybody knows the real estate expression “location, location, location.” But what constitutes the “ideal location” may shift from urban to rural as many businesses look to cut costs and adapt to a remote workforce. Residentially, the slumping economy and lost jobs will soften prices. With newfound working mobility, employees may leave large cities to seek cheaper housing, accelerating urban sprawl. Though this will undoubtedly hurt those whose home sale was a key component of a near-term retirement, it may be an opportunity for others to finally participate in the housing market.

¹ <https://business.financialpost.com/real-estate/not-even-real-estate-is-immune-from-the-impact-of-the-coronavirus>

Implications

Millennials and Gen Zers now unable to buy houses themselves may move back in or continue staying with family. This would soften demand over the long term until savings caught up, housing prices dipped, or both.

Baby Boomers and Gen Xers relying on a home sale to fund retirement may need to rethink their plan or keep working if they can.

Marketers will embrace remote marketing. Technology and real estate prices may cause lasting changes to the makeup of towns and cities: “If online learning becomes a reasonable substitute for in-class learning, universities might lower future spending on campus expansions in cities with expensive land markets.”¹ This has lasting implications for the way brands and companies engage with customers.

Evolving uses of discretionary income

With new limits on global travel and certain urban experiences, those with excess disposable income will look for new ways to spend time, spend money, and signal their status.

When even partial normalcy returns, consumers may buy more big-ticket items, or plan lavish staycations in their own cities and provinces. This trend may continue for a while before large-scale international travel resumes. The fight for these newly available discretionary dollars has ramifications for corporations, local businesses and marketers as new opportunities emerge (e.g. with experiential marketing).

Meanwhile, the immobility of now-grounded business travellers will negatively impact accommodation, airlines and local tourism industries.

Implications

High-income groups will be searching for new ways to indulge while staying put, developing new signals of status to replace global travel and the purchase of foreign goods.

Millennials and Gen Xers with younger families will be looking for joint experiences to enrich their family lives together before being able to return to international traveling.

Marketers will need to increase their empathy. As brands look to capitalize on the growth in at-home and online shopping, it will be critical to remain empathetic and in tune with the human side of the post-pandemic recovery.

Widening economic inequality

In a post-pandemic world with a shrinking middle class, the gap between the “haves” and “have nots” will continue to grow as a new group of “used-to-haves” emerges.

Those without emergency funds and savings are the most likely to be laid off or go deeper into debt to pay bills or medical costs. In contrast, those with savings can capitalize on cheap credit and invest through the downturn to grow their wealth further. This dichotomy will have lasting impacts on marketing as the gap between those with and without grows. Additionally, many brands will need to adjust on the fly as the financial segments are shaken up: the associated unemployment in this downturn, and evaporation of retirement savings for millions, mean the number of “used-to-haves” will grow exponentially.

Implications

Millennials and Gen Zers who paid large sums for post-secondary education, but now face diminished short-term job prospects, will likely rely on loans or family. Those coming from lower-income families will struggle as the usual economic equalizer of education now leads to fewer jobs (and still debt to pay).

Baby Boomers and Gen Xers poised mere weeks ago to retire comfortably will now be stuck working or waiting for the dust to settle. The unprecedented nature of the situation means no one knows how long the “waiting game” could continue.

Marketers will be faced with trickier targeting challenges. Casting wide nets for consumers will be increasingly ineffective as messaging that resonates with key groups will diverge. This will force drastic brand repositionings that could cause companies to split, hyper-focus or, possibly, suffer.

Scarcer venture capital slowing start-ups

Investors will take fewer bets on the small and new, while larger companies will lean on their cheap credit and size. This will result in less innovation and disruption.

The last 10 years have seen technology propel “unicorn” companies into the spotlight. As consumers look for trustworthy and safe brands, this could be a time for traditional businesses to make up lost ground. Additionally, disruptors around the “gig economy” may find willing workers scarce due to health concerns. Together, this may produce a window of opportunity for larger, traditional companies to win back market share.

Implications

Millennials and Gen Zers have historically been quickest to adopt disruptors (e.g. Uber, Airbnb). Their approval will be critical if traditional players want to win back market share.

Lower income groups, generally speaking, are more likely to use the gig economy occasionally for supplemental income (e.g. food delivery, Uber driving). The pandemic may reduce the number of willing workers as people witness the benefits of stability over flexibility and seek work with benefits, for example.

Marketers will migrate from sexy to sturdy, and messaging may shift from emphasizing innovation and disruption towards permanence, trust and security.

Macro- Societal Trends



Unprecedented digital access & resources

Society will shift rapidly from physical to digital, resulting in more information and more content, and using the internet as it was always intended.

After watching entertainment and learning industries quickly — and nearly completely — shift to digital, other sectors will follow suit. We'll see the digital medium break open with human generosity and empathy as subject-matter experts begin to share relevant and timely information, and organizations collaborate and give away innovative solutions to our toughest shared problems.

All signs predict that these trends will continue and evolve, not only as people enjoy the benefits of consuming content in more convenient and cost-effective ways, but as we look for ways to connect, and share information and resources.

Implications

Gen Xers and Gen Yers are the groups most impacted by this digital/societal shift, as many younger cohorts have already integrated digital interactions into their daily lives.

All income levels will be granted access as many business models will be based on “attention” (e.g. ads), as opposed to prohibitive upfront costs.

Marketers will look for ways to deliver high-quality, value-driven content or develop strategic partnerships with content providers in order to become trusted curators of information.

Health, wellness & wellbeing will boom

Already expanding quickly, the health, wellness, and wellbeing sector will see seismic growth, with added attention placed on at-home and in-pocket.

In a post-pandemic world, we can also expect telemedicine to become commonplace, with new technologies, including diagnostic and treatment tools, to support remote consultation with physicians. The home fitness revolution will continue to grow as brands such as Peloton expand their offering and people forego expensive club memberships to stream workouts from the comfort of home. An increased focus on personal health and mental wellbeing means people will increasingly manage their health proactively as a preventative measure.

Implications

Boomers and Gen Xers will propel the revolution, with many trying to balance complicated family and professional lives.

Higher income groups are most likely to be impacted by this home wellness boom. As Maslow's hierarchy shows, those in lower income brackets will likely be more focused on meeting more basic needs; however, innovative solutions could emerge to serve those across income ranges.

Marketers that push brands to help people stay well (mentally and physically) will have an advantage over more "indulgent" brands.

The rise of the virtual experience economy

Cancelled live events make the live-streaming and virtual attendance of concerts, sports, operas and other cultural events commonplace.

With the recent acceleration of virtual reality (VR), augmented reality (AR), and mixed reality (MR) technologies, many consumers will be interested in immersing themselves in experiences that feel very “real.” We will witness higher demand on socially interactive platforms, including a spike in gaming productions and the rising phenomenon of eSports events. This new era will usher in a vast virtual world where the usual constraints of the physical world, such as accessibility, cost and consumer capability, no longer apply.

When it comes to physical experiences, we expect that in-person experiences will become smaller and more intimate, while being amplified digitally for reach. As a consequence, in-person experiences will become more special and valuable. The experience of fulfillment for consumers of all kinds of goods and services will also become far more important. Think of today's unboxing videos and the masterful way Apple packaging has always enhanced the consumer experience. This is only going to become more important and more of a brand differentiator.

Implications

All age ranges will be impacted by the flood of virtual experiences. Though likely to be initiated by tech-savvy Gen Zers, soon all ages will find a virtual experience that aligns with their interests, no matter how obscure.

High-income households may spearhead the trend, but it won't be long until technology evolves such that it's accessible to everyone.

Marketers will seek the ability to produce immersive and transformative experiences that reach broader audiences, while also being forced to deliver dynamic new approaches to storytelling.

Consumption will be curbed

Previous goals to consume and reduce waste will shift from desires to mandates, and customers will demand that brands not only follow along, but facilitate.

The increased global population and climate crisis encouraged people to reduce their consumption, waste and energy use prior to COVID-19, but now consumers will be forced to make these changes. In turn, they will push for companies to reimagine their corporate purpose and actively call out companies to help defend the world from contagions and climate disasters. According to Nielsen¹, regions rampant with health and environmental hazards in their everyday have higher expectations for corporate sustainability. Now, however, as developed nations experience unprecedented turmoil, consumers will exercise their power and voices to support brands that effect the changes they want to see.

¹ <https://www.nielsen.com/us/en/insights/report/2018/the-education-of-the-sustainable-mindset/>

Implications

Millennials, Gen Zers and Gen Xers will unanimously and passionately believe that companies should help improve the environment.

Gen Zers will be even more adamant that brands shrink their industrial footprint and do more to care for the environment.

Marketers will be forced to revisit their commitment to sustainability as consumers use their spending power to support brands that effect the change they want to see, especially as income dwindles and corporate sustainability demands grow across all age cohorts.

Even more love for local

Pride and power in local culture will become even more sharply defined and relevant, with brands expected to respond appropriately and creatively.

Leading up to COVID-19, research showed more than half of consumers believed that local brands and products were more authentic than content and products from other countries¹. This sentiment has been amplified throughout this pandemic, and will soon be baked into consumer culture as consumers further prioritize environmental responsibility through supporting local businesses and connecting with communities.

¹ <https://wavex.umww.com/culture/reglocalize/>

Implications

Millennials are hyper-committed to local, with almost 70% willing to pay more for goods and services if they're sold by a small or local business. This figure will likely increase in the COVID-19 era across all generational cohorts as pockets shrink and local pride is renewed.

Marketers must enable their brands to become conduits for helping people connect with their local community, or prioritize local by partnering, sponsoring and supporting regional companies, events and experiences.

A return to faith in experts

Expertise will truly matter, with a new global keenness for the type of deep knowledge displayed by the likes of medical professionals Theresa Tam and Anthony Fauci.

In the last couple of years, society has elevated reality stars as leaders of the free world, has crowned social media influencers as experts on wellness, and have given anti-vaxxers the same share of voice as PhD vaccine researchers. But the Pew Research Center has found that tendency could be reversing, as belief that experts act in the public interest has been trending slowly upward since 2016¹.

The 2020 Edelman Trust Barometer report showed 83% of Canadians trust scientists to address challenges Canada faces, whereas only 42% of Canadians believe in CEOs and government leaders. Furthermore, trust in social media, search engines and traditional media have all declined, notably social media, which dropped five points to 26% ².

¹ <https://www.pewresearch.org/science/2019/08/02/trust-and-mistrust-in-americans-views-of-scientific-experts/>

² <https://www.edelman.com/trustbarometer>

Implications

All generational cohorts will develop a newfound respect for experts across all categories, especially health, pharmacy and wellness. Consumers will seek facts and reliable information as they look for ways to get back on their feet after this pandemic.

Marketers who are able to show that their brands aren't just research experts, but true practitioners of the knowledge they preach in their respective categories, will be able to establish and earn the trust of consumers as they seek facts, reputable sources and validated information more than ever before.

Changing Consumer Psychology



New conflict between saving & spending

New forces driving urges to spend and save will place previously unseen mental and financial challenges upon modern consumers.

As the health risks subside, consumers emerging from isolation will strive to “get back to normal,” but financial constraints will leave deep-rooted insecurities about their ability to spend. The tension between the need for normalcy and the financial constraints around spending normally will cause consumers to oscillate between these conflicting realities and establish new patterns and coping behaviours. Consumers will shift back and forth between different consumption modes, from discretionary consumption, to impulsive consumption, and even to compulsive consumption.

Implications

High- and middle-income

“knowledge workers” laid off as a result of global slowdown will demonstrate these new behaviours in more obvious ways, and on a larger scale, than others. These groups are more accustomed to having the means to participate in indulgent spending behaviour but their constraints will be longer lasting.

Marketers need to understand how they can benefit from the indulgence and comfort their products can offer. To steer clear of being perceived as taking advantage of consumer behaviour, they should focus on offering advice and content to help consumers find out how their products fit in their lives.

More minimalism & seeking of self

As people recover from feeling varying degrees of existential threat, isolation and confinement, they will focus energy and attention to restoring a sense of self.

This shift will manifest itself in various ways, including a renewed interest in minimalism and simplification with a heightened focus on self-actualization and improvement, both in terms of how people see themselves and how they want to be seen by others. Consumers will continue to build momentum around the Marie Kondo version of minimalism, with new financial constraints further validating and breathing interest into the concept. In addition, personal spending on overall wellness (inside and out) will increase, demonstrated in health, beauty and fashion as people emerge from isolation and engage in more social contexts.

Implications

Higher earners will increase spending on wellness-promoting goods and services as a way to assert their status and demonstrate their safety.

Marketers should demonstrate values of simplicity, value and essentials, with a focus on how products and services may help people become a better version or expression of themselves.

The caring & sharing economies will converge

With newfound connections to community, we will see massive momentum behind the nascent "caring economy" and convergence with the well established sharing economy.

Regardless of the degree to which they participate in their communities, people will have faced tragedy, loss and trauma, either directly or through their social networks on a large scale, and will be forced to confront the aftermath. This broader context will have lasting effects on how people respond to, process and engage as consumers, and will result in a new set of attitudes, motivations and behaviours that favour social engagement. Consumption-wise, we will see the emergence of alternate forms of commerce as people's patterns get disrupted. Furthermore, people will look for new opportunities to engage socially as digital platforms bleed out into the physical world.

Implications

Millennials and Gen Xers will demonstrate higher participation in the "caring economy," and older generations will likely benefit from it.

Marketers need to evaluate their brand's values with respect to how their products/services can play a role in the caring/sharing economy. Brands will need to consider how they can contribute to the discourse in meaningful ways and where to abstain. Which brands will have the permission to re-frame life or death? What will remain taboo and what will become fair game?

The potential pandemic of mental health

A second wave of illness will tax our system in the form of mental illness. It will not be as acute, but will have lasting implications on consumer behaviour and overall zeitgeist.

This wave will be widespread and touch every demographic and socioeconomic status. A first wave of post-pandemic consumer consumption will be driven by a rebound from isolation, a thrust to exert one's sense of self, and participation in alternative forms of social interactions. This will be followed by a wave of skepticism and malaise that exacerbates those feelings of uncertainty and discontent already gaining momentum before the pandemic as a result of a "post-truth" era.

Implications

Millennials and Gen Zers will look to digital tools and forums to tap into the collective to handle their mental health tensions.

Older generations, impacted by the disease beyond just the isolation, will have a permanently altered perspective on their health. Some, in particularly those in hard-hit communities, may even have a type of "survivor guilt."

Marketers will be challenged by a lack of trust and skepticism that makes traditional media tropes ineffective. Brands will need to push creativity, present original perspectives, and take new risks to inspire consumers. Tapping into the discourse and inspiration of creatives such as stand-up comics, poets and performance artists - the keen observers of society and who actively test the limits of acceptability of the broader culture - will help marketers find perspectives that resonate.

Politics & Civil Liberties



We're all in this together

The global pandemic has exposed and amplified the ways in which we are all connected, as well as each person's responsibility to the collective.

During a shared crisis, Canadians believe that the decisions they make as individuals will have an impact on the collective wellbeing. The pleas to social distance, effectively forcing people to consider the elderly and immunocompromised, will condition us to change how we perceive neighbours and strangers. We will reach new levels of communal cohesion. In addition, as wide swaths of the population require and accept government support, the stigmas typically associated with it will lessen.

Implications

Higher income groups, generally speaking, have access to better healthcare solutions and achieve better health outcomes. However, the indiscriminate nature of COVID-19's impacts may cause some wealthy Canadians to dial up the empathy and collectivist mentality.

Marketers will need to be more mindful with the actions and communications their brands take, aiming always to emphasize inclusivity. Companies should anticipate special needs that may emerge or exist within their target market and workplace.

Heightened attention & access to news & government

All levels of government will become more visible and elected officials will approach challenges with radical transparency.

In an effort to keep citizens safe and informed, many major news outlets removed firewalls or unlocked their 24-hour news service. Canadians also became accustomed to daily briefings from the Prime Minister and Chief Public Health Officer, as well as frequent updates from provincial and municipal leaders and health officials. This unprecedented access to elected officials and radical transparency about decision-making causes the public to move away from reading headlines, become more invested in the news and develop new levels of trust in public officers.

Implications

Low-income groups will benefit most from this increased access, though it will be welcomed by all. Low-income individuals are the most likely to be out of work — lower-wage jobs are the first to go — and will therefore be more invested in government messaging. They will also benefit most from dropped firewalls and unlocked news network subscriptions.

Marketers will benefit from providing consistent, up-to-date information across channels to buoy buyer confidence. They may also look to local news outlets as renewed avenues of communication.

Liberties will give way to securities

During times of crisis, people are more willing to allow limits on their civil liberties.

Canada's founding principles of "peace, order and good government" are often contrasted to America's "life, liberty and the pursuit of happiness." Already a more collectivist society than the U.S. — evidenced by our politics, patriotic embrace of universal health care and certain social programs — Canadians may actually see fewer of their civil liberties curbed, provided they continue to comply with the requests of government and public health officials. As of last week, 85% of Canadians were already practising physical distancing; programs such as the Emergency Response Benefit will make it even easier for them to do so. Our proactive attempt to flatten the curve may allow Canada to recover from the COVID-19 crisis and make a return to the new normal more quickly than our neighbours to the south.

Implications

Higher income groups and older generations may be most unwilling to tolerate limits to their civil liberties. Younger generations, desensitized by intrusive technology to being "observed" and "limited," will be more accepting of their civil liberties being curbed.

Marketers should look to demonstrate clear intentions, as this will be time to earn trust with transparent communication across all channels and measurable actions.

Delays to the climate change discussion

The urgency of fighting a global pandemic and a coming recession will likely distract from the existential crisis of climate change.

Some goals of climate activists will be achieved seemingly overnight as air travel slows and governments move to shut down non-essential businesses. Resulting improvements in air and water quality could put pressure on manufacturers not to reverse any reductions in pollution. But, as governments try to restart economies, regulations may also relax. In the short term, the public will be distracted by the current and future pandemics, as well as by their own economic hardship. Government and private funding may flow into anti-poverty initiatives and away from environmental organizations and causes; all in all, widespread support for climate protection will wane.

Implications

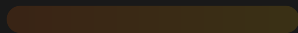
Millennials, Gen Xers, and Gen Zers are typically the most vocal groups in the climate change debate, forcing the issue and sparking broader public dialogue. It follows that the same group of climate change drivers will ensure the environmental lessons of COVID-19, particularly the proven efficacy of long-suggested measures, get appropriate airtime.

Marketers and their brands will face difficult decisions regarding their investments into green initiatives. The social currency of carbon-conscious efforts may be reduced, but the efforts themselves will be as important as ever — and could very well be at the core of a future global crisis.

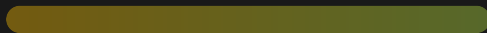
What's Near

The post-COVID-19 future

In a post-pandemic world, a global sigh of relief quickly turns to reflection. Citizens and nations take stock of the permanent imprints left by the virus. Despite the catastrophes, opportunities will emerge for nations whose government acted assertively and businesses that adapt quickly.



NEXT 3 MONTHS



3 TO 18 MONTHS



BEYOND 18 MONTHS

Looking toward what's near

It's clear people will be deeply and permanently affected by events at this scale. What's slightly less clear is how these impacts will unfold over a longer time horizon. The fluidity and volatility of the situation make forecasting quite challenging, at least until more is known about the efficacy of policy responses and progress of epidemiological research.

That said, it's safe to assume the impacts of COVID-19 will be:

Widespread

The pandemic will have sweeping and lasting ramifications on businesses, families and citizens.

International

The effects will be world-altering and may even shift the balance of power among nations.

Revealing

Social and economic weaknesses will be exposed; real or perceived inequities and threats will trigger responses.

Polarizing

Some by-products will be highly dangerous and destabilizing, while others may present opportunities.

A spectrum of speculations on our not-so-distant future

- **Technology will continue to foster responses** to each subsequent consequence of this unfolding crisis. Solutions for coping with pandemic preparedness and social distancing are evolving daily. We should expect similarly robust technology responses to the economic upheaval, as well.
- **Innovation in technology will move in parallel with**, and in some ways accelerate, innovation in social, political and economic structures. For example, if our consumption of products and experiences is increasingly online, are we likely to continue voting in church basements?



A spectrum of speculations on our not-so-distant future

- **A re-evaluation of home ownership as a source of economic security.** Individually owned condos might be transformed into corporately owned rental buildings. Zoning on single-family homes might be revised to permit more multi-unit occupancy.
- **A re-evaluation of individual retirement planning** and possible return to defined benefit pension plans.



A spectrum of speculations on our not-so-distant future

- **Through all of it, cultural meaning will be explored in tremendous depth.** The cultural media itself (*e.g.* movies in theatres, sports in arenas) may be permanently altered. All cultural products will be viewed through the lens of pre-pandemic vs. post-pandemic.
- **Lastly, as a species, human beings have a need for social and physical interaction on a regular basis.** There is no doubt that, for several years at least, we will be exploring newer, safer ways to satisfy that need.



Looking around corners

After Right Now is our first attempt to see past the immediate crisis of COVID-19. Thank you for joining us to think about our collective future. Our views are modestly informed speculation at this point, and we welcome all input, including disagreement. It's a discussion that has only begun and, over time, we will elaborate on many of these themes while digging deeper into the implications for marketers and brands.

Sharing this is encouraged. Contacting us is welcomed. And thanks again.

jack.bensimon@bensimonbyrne.com

