



# Life After The Pandemic:

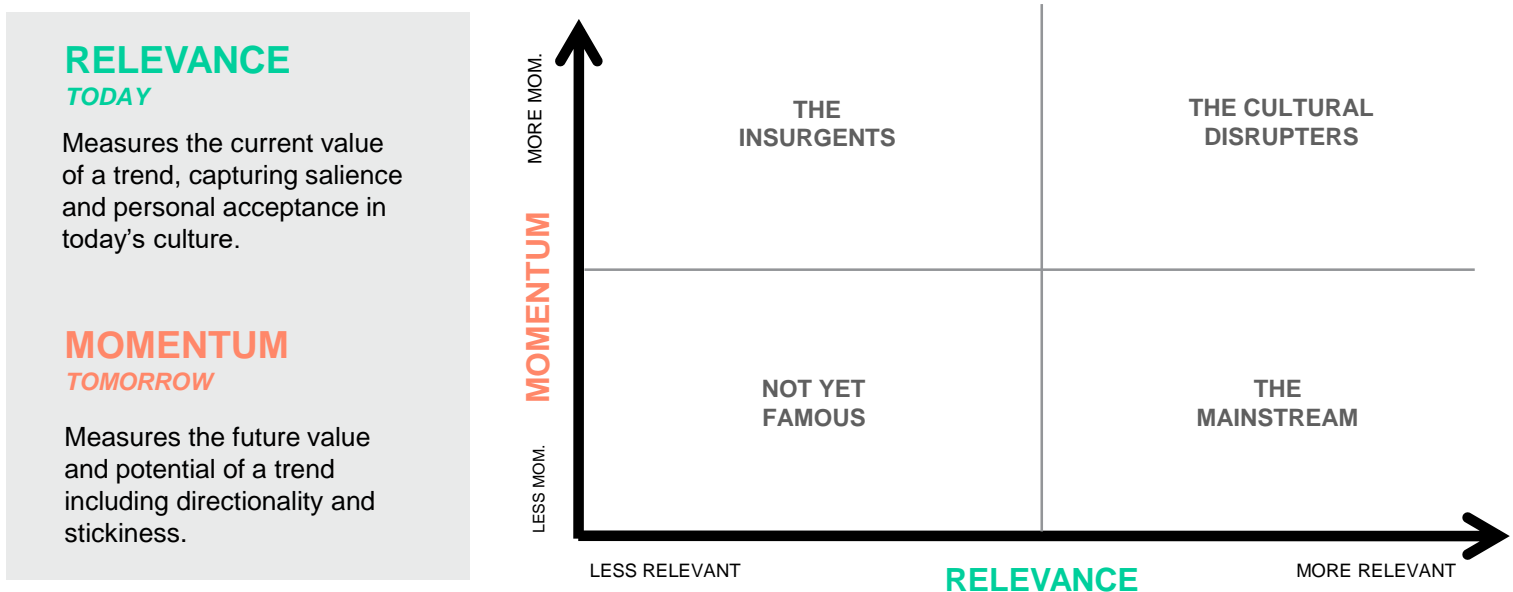
What trends does your brand need to strategize against?

# Introduction









## Mapping Trends That Matter Most To Inform The New Normal

In a post-pandemic world where nothing is as it used to be, understanding which Cv19 related trends will be sustained and which will fade as we adapt to a 'new normal' is difficult but imperative for brands to own the new ways of living and interacting. At Harris, we contextualize trends that will shape our world using a proprietary model designed to quantitatively measure these social shifts.

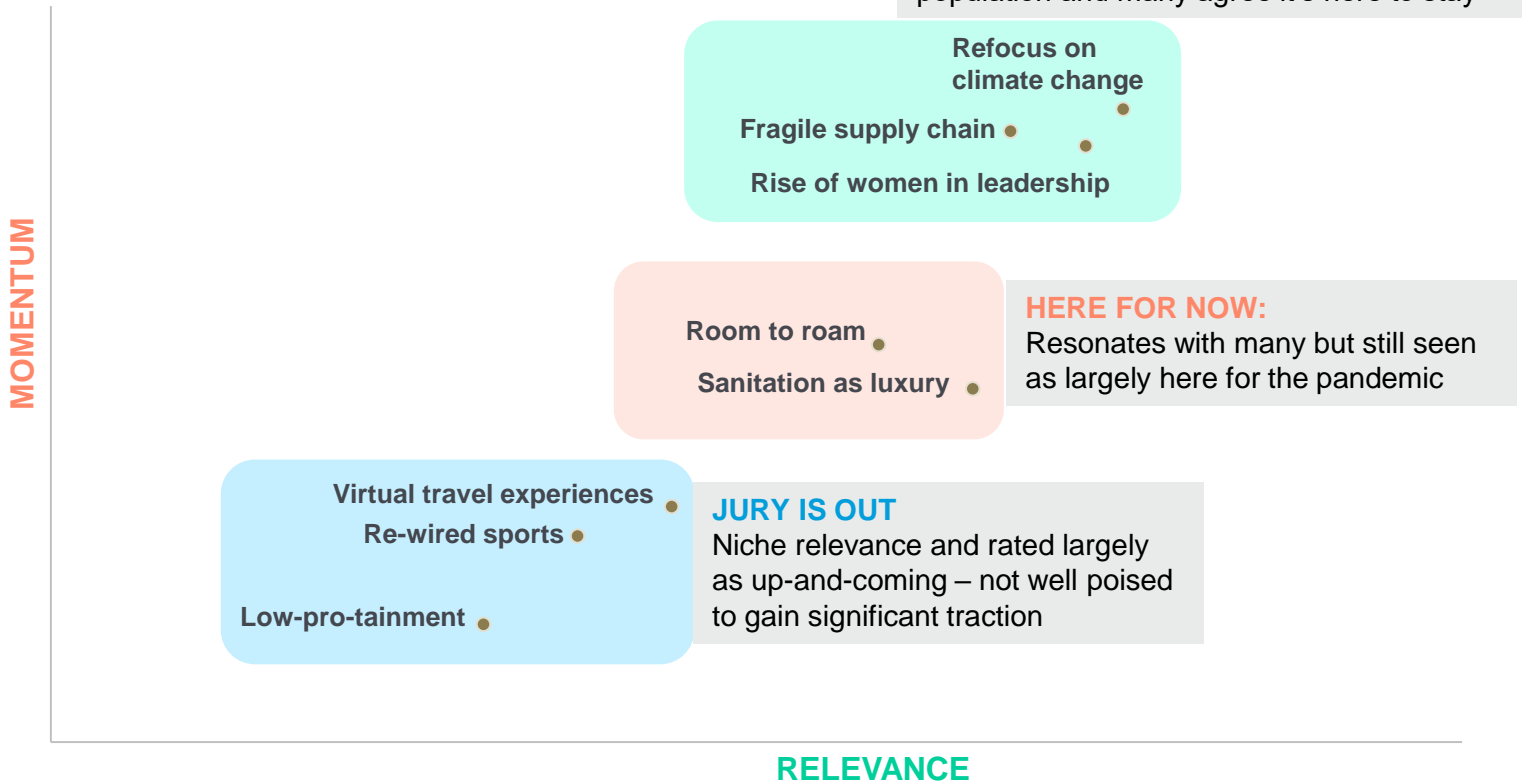
Each trend is measured using two proprietary composite metrics:



### IN THIS EDITION WE EVALUATE 8 EMERGING TRENDS:

-  **The Fragile Supply Chain:** A heightened awareness of where things come from and an increased desire to buy closer to the source
-  **Low-pro-tainment:** Entertainment gets permission to go low-production, fail fast and try new things
-  **Re-Focus on Climate Change:** A realization that your actions can actually impact planet and environmental health
-  **Room to Roam:** Re-imagining cities to provide more pedestrian and bike friendly spaces, including closed-off streets
-  **Re-wired Sports:** Sports leagues are leveraging e-sports as a way to build excitement
-  **Sanitation as Luxury:** The highest level of service is no longer 24-hr room service but deep cleans and 72-hour gaps between users
-  **The Rise of Women in Leadership:** Female leaders have increasing visibility and respect for successful responses to crisis – will that lead to seeing more women in high offices?
-  **Virtual Travel Experiences:** If you can't physically leave your neighborhood, how about walking city or house tours, or meditation with sheep?

# Trend Trajectory



The trends in this edition cluster into three fairly distinctive groups – those that have widespread relevance and strong momentum and are likely to be cultural disruptors, those that are seen here only for Cv19 and those that are still niche players.

The strongest trends are around the renewed focus on climate change, an appreciation of women in leadership roles and a new cognizance of our supply chains – and their fragility.

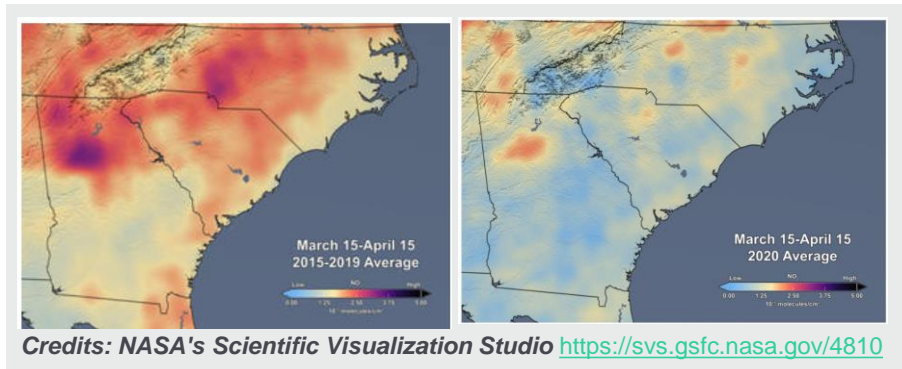
We also see American's believe some aspects of the 'new normal' won't stick around post the most acute phases of the pandemic. As cities including Seattle, Oakland and Minneapolis close city streets to provide more room for socially distanced outdoor exercise most see this as something just 'here for covid'. Similarly, the idea of sanitation as the new luxury is relevant to most, but something many don't believe will be a long-term trend.

Other emerging trends such as virtual sports, virtual travel experiences and low production entertainment have much more niche relevance and are typically seen as still 'up and coming'.



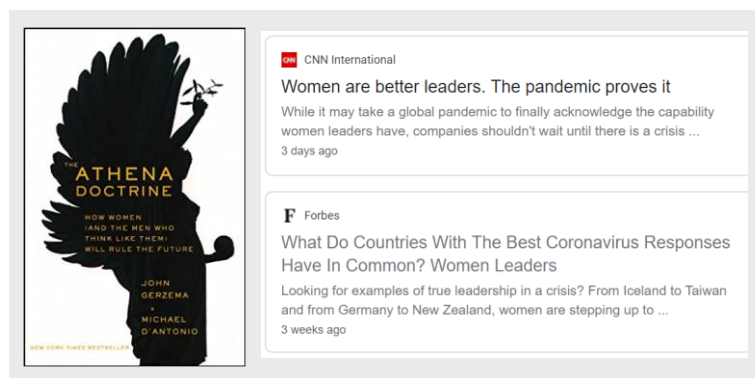
# The Cultural Disruptors

A **renewed focus on climate change** leads this weeks trends in terms of stickiness and exposure. Nearly 80% of Americans have heard something about the impacts of Cv19 and the climate in recent weeks and one-third firmly believe this trend is here to stay beyond the pandemic.



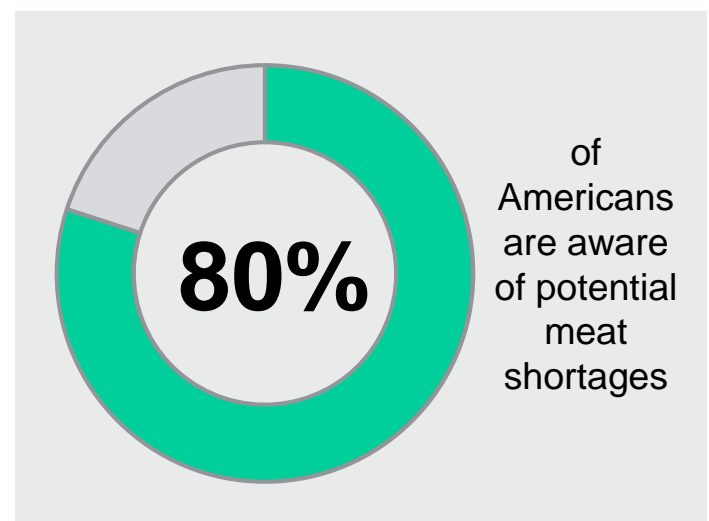
Much of the reduction in air pollution is attributed to global 'stay at home' orders. This trend may continue as 84% of American's agree that 'if work is able to be done remotely employers should not require their employees to return to the office until COVID-19 is no longer a threat.' <sup>1</sup>

Cv19 has also brought to life the cultural narrative related to **women in leadership** – specifically highlighting female heads of state as having had some of the most effective Cv19 responses.



Feminine values in leadership have been on the rise for some time – as highlighted in The Athena Doctrine (authored by The Harris Poll CEO John Gerzema and Michael D'Antonio) – but the pandemic has increasingly made this front page news (think Angela Merkel, Jacinda Ardern, and Tsai Ing-wen). 38% of American women, and 32% of men believe that a rise of women leadership will continue into the future.

The past two months have also heightened **American's awareness of the supply chain** required to provide day-to-day items – and the fragility of that supply chain. As toilet paper flies off the shelves, and now with a meat shortage looming, many are for the first time realizing just how many steps go into getting groceries to the local market, and how optimized that supply chain is to serve the 'old normal'. The pandemic has made us much more aware – and many are worried. Eight in 10 Americans (80%) are aware of potential shortages of meat and half (50%) are stocking up on at least one type of meat or fish. <sup>1</sup>



**Recommendation: Brands are encouraged to lean into these trends and find ways to proactively leverage (or own) them to their advantage.**

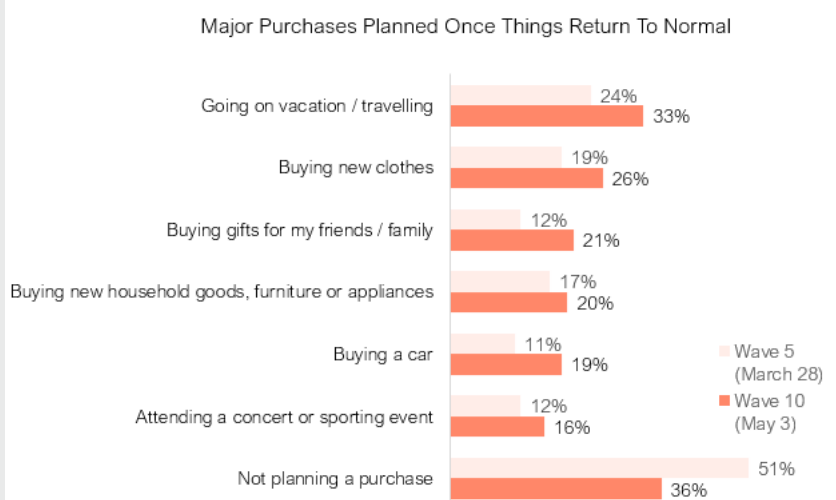
<sup>1</sup> Data from wave 10: The Harris Poll COVID-19 survey, fielded online among nationally rep sample of 2,039 U.S adults May 1-3, 2020.

# Here for Now

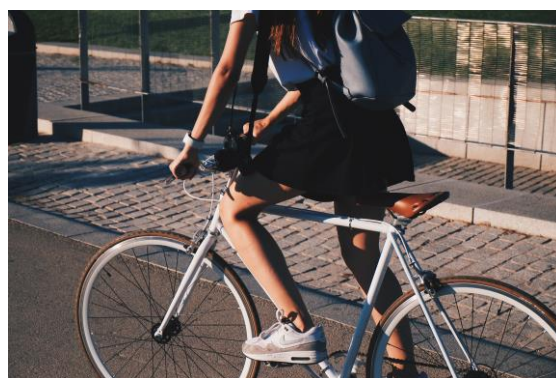
**Sanitation as the new luxury** is a trend that many see as 'here for Cv19'. However, data from The Harris Poll suggests this trend is one that may have more momentum than Americans realize (or wish for).

While 33% of Americans are planning travel/vacation once the virus has flattened and lockdowns are lifted, 63% say they won't be willing to stay in a hotel for at least 6 months.<sup>1</sup>

These opposing forces—fear vs. desire—mean that some will be willing to pay for that experience they've been putting off – or need after weeks at home, even if it costs more to get it and make it safe. And most (74%) are willing to pay for a 'new premium' experience that is grounded in preventing disease spread – socially distanced dining, exclusive access to outdoor space, etc.<sup>2</sup> As restrictions start to lift, all industries should be thinking about how to mitigate fear without ruining the experience all together.



Many American cities are now giving citizens **more room to roam** by closing off streets to allow for more socially distanced outdoor activity. While many may not yet see this trend has having real sticking power – authorities may make that decision for them. Seattle, WA announced on May 7, 2020 that it will be permanently closing 20 miles of streets to vehicles. This move made permanent the 'Stay Healthy Streets' effort that began as a temporary Cv19 response.<sup>3</sup>



**Recommendation: While many do not yet see these trends as part of the 'new normal' data suggests that brands should watch these trends very closely as there are signs that they may be more permanent than people think.**

<sup>2</sup> Data from The Harris Poll: General Population, N=2,068

<sup>3</sup> <https://www.cnn.com/travel/article/seattle-streets-closed-stay-healthy-trnd/index.html>



# Jury is Out

The data also highlighted three niche trends. These have lower perceived momentum than the trends previously discussed and are generally relevant to more niche audiences.

## Virtual travel (or staycation) experiences –

walking tours of your city, virtual experiences – fall short as a substitute for tactile in-person experiences. As mentioned previously, Americans are willing to pay a premium price to get a ‘real’ experience, and are ready to trade in the virtual for the real as soon as they can.

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## You Can Take an Online Meditation Class With Sheep

When/how should **current sports seasons** resume?

41%

play now without fans/phase fans in later

15%

play only when fans can attend

How do American's miss watching sports and **will they ever feel safe** enough to attend games?

45%

miss watching on TV

49%

miss attending in person

21%

nothing would make them feel safe to attend in person

6%

would go to a game as soon as allowed

The pandemic grounded sports, as we know them, to a halt, leaving many Americans with a hole in their lives. Nearly half say they miss watching sports on TV or in person.<sup>1</sup>

To address this, some leagues **have turned to e-sports**. Formula 1 in particular has launched a series of Virtual Grand Prix races.

However, most American's don't see this as a long-term option to 'sports'. Only 1-in-5 would prefer e-sports over other 'pandemic alternative' options such as live sports with no fans in attendance.

The last trend, **Low-pro-tainment**, stems from American's hunger for new content that is hard to produce in a socially-distanced world.

While this new production style has been widely leveraged (and accepted) across live TV shows recently, most don't see this as an enduring trend. And many Americans – 46% indicated they weren't even aware this was happening.

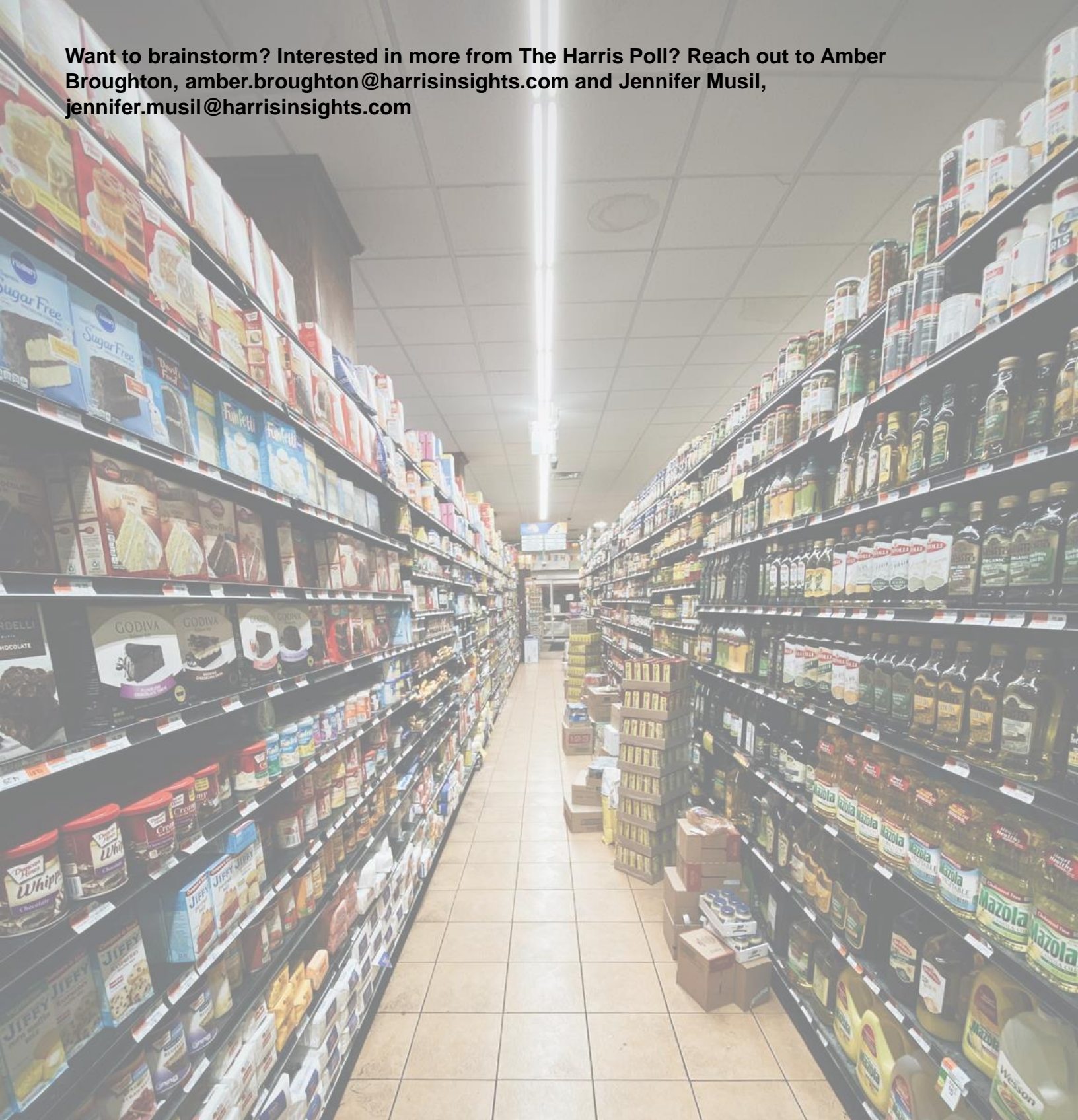


**Recommendation:** These trends are much more niche and while certain brands have an opportunity to capitalize on them – particularly in the short term - long-term, widespread excitement is likely to be limited.





Want to brainstorm? Interested in more from The Harris Poll? Reach out to Amber Broughton, [amber.broughton@harrisinsights.com](mailto:amber.broughton@harrisinsights.com) and Jennifer Musil, [jennifer.musil@harrisinsights.com](mailto:jennifer.musil@harrisinsights.com)



#### Methodology

This survey was conducted online within the United States by The Harris Poll from April 23-24, 2020 among 1,039 U.S. adults ages 18 and older. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated. For complete survey methodology, including weighting variables and subgroup sample sizes, please contact [Amber.Broughton@harrisinsights.com](mailto:Amber.Broughton@harrisinsights.com).