

COVID-19

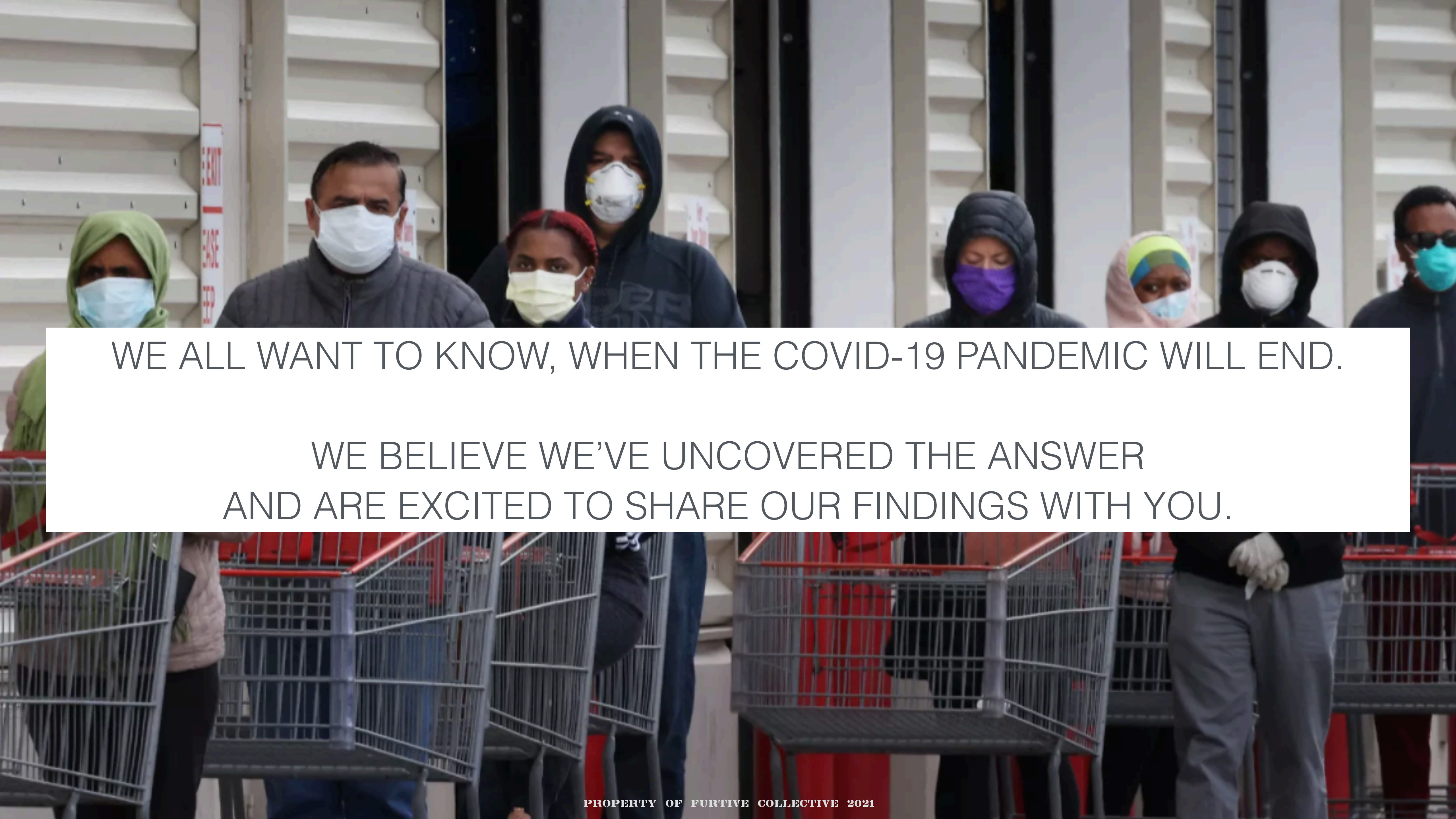
Forecast: What's ahead for brands in 2022 and beyond

January 27, 2021



FURTIVE COLLECTIVE

A DIGITAL CONSULTANCY



WE ALL WANT TO KNOW, WHEN THE COVID-19 PANDEMIC WILL END.

WE BELIEVE WE'VE UNCOVERED THE ANSWER
AND ARE EXCITED TO SHARE OUR FINDINGS WITH YOU.

Like the rest of the world, we're doing our best to hold onto light at the end of the tunnel.

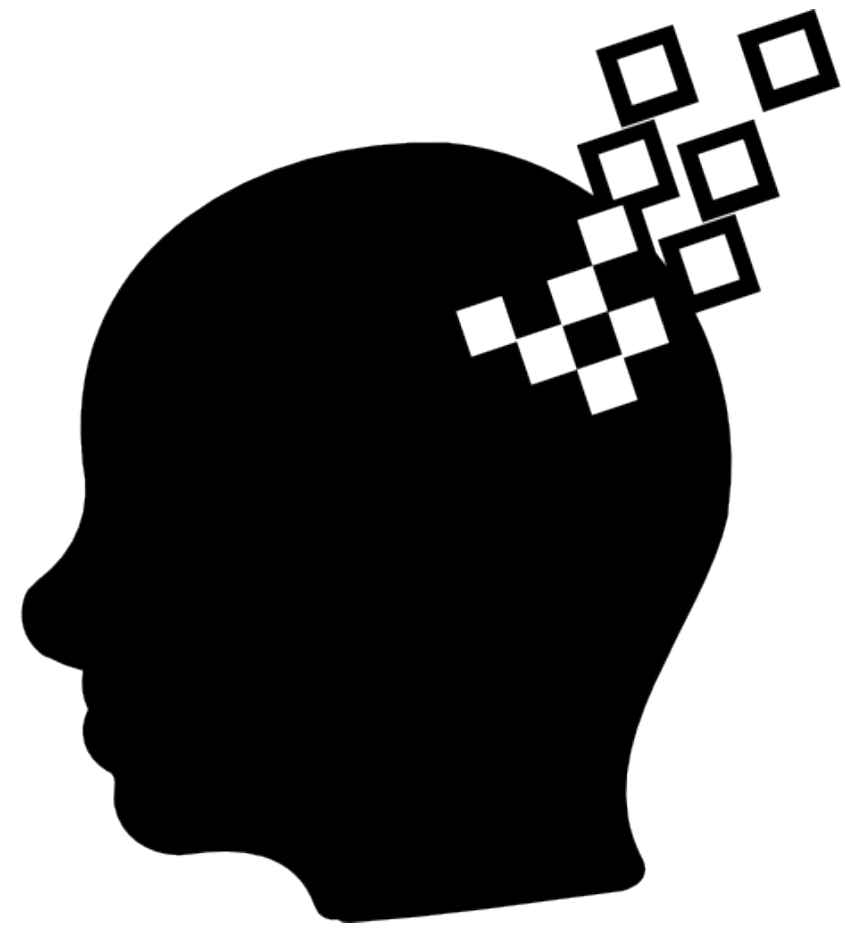
While we lost a good portion of our business at the start of Covid-19 Pandemic- we've spent a considerable amount of time studying it's affect on the economy, culture and our personal lives.

With that, we wanted to share our most impactful learnings and when we we'll see things "return to normal".

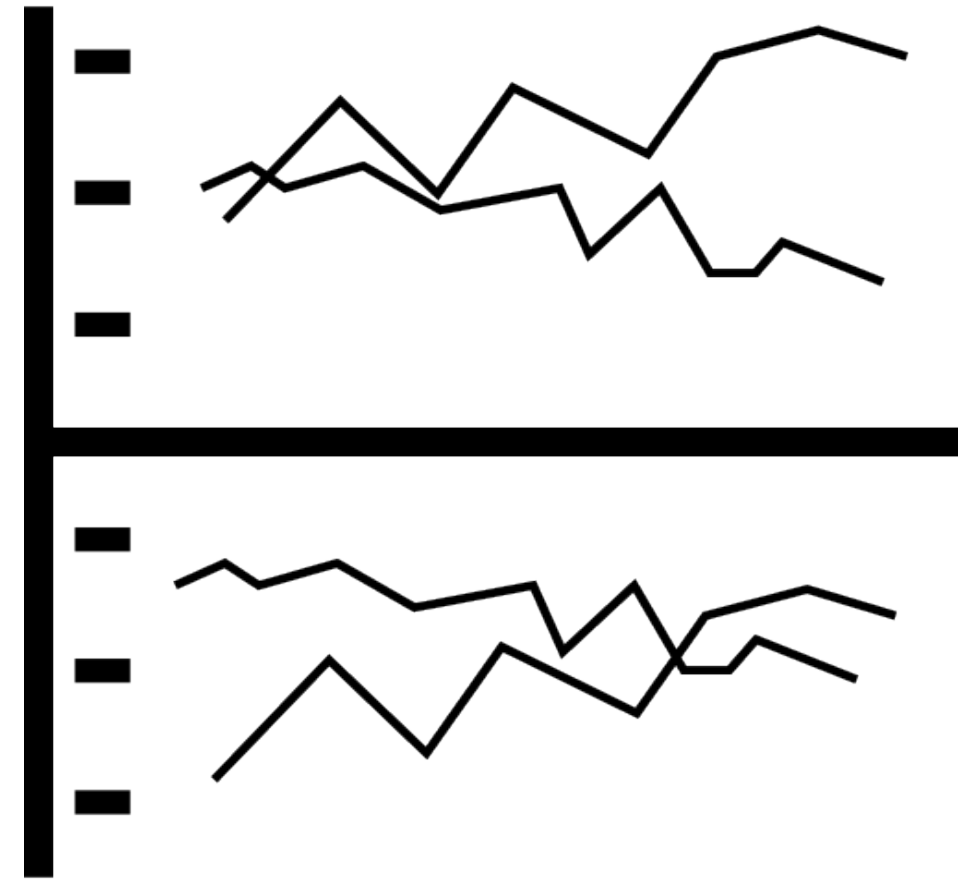
We don't believe in guesses and everything we do is deeply rooted in consumer data. So naturally, we turned to our advanced data capabilities to uncover why we believe 2022 is the light at the end of the pandemic "tunnel".



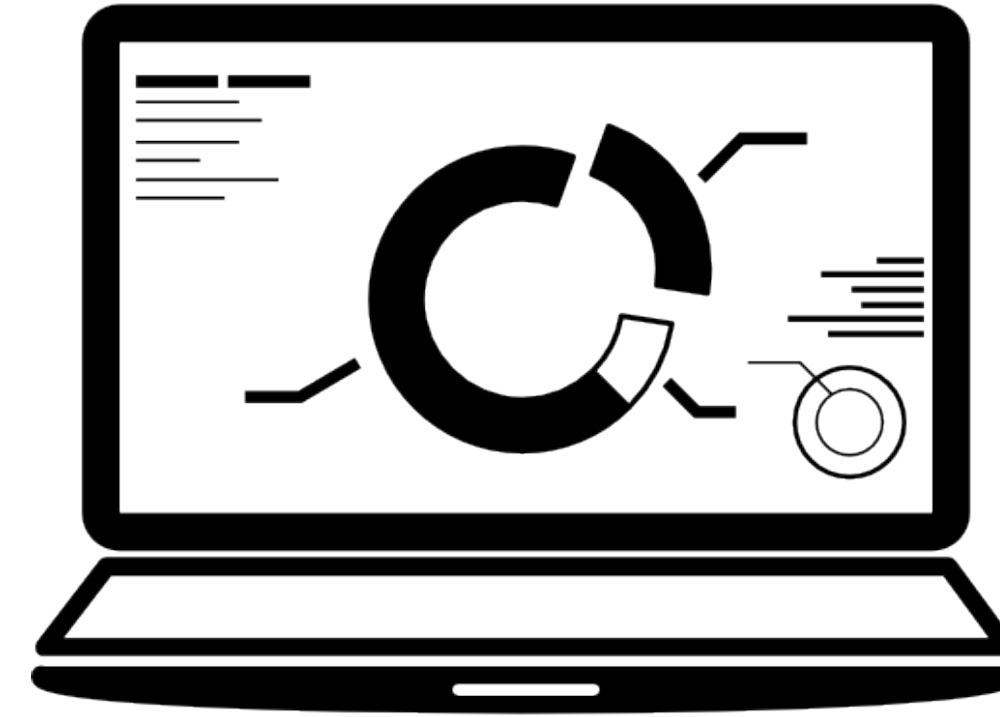
STUDY BACKGROUND



Qualitative:
How people are feeling



Quantitative:
Economic Trends



Analytics:
What people are saying/doing

+



Vaccine:
Development and deployment

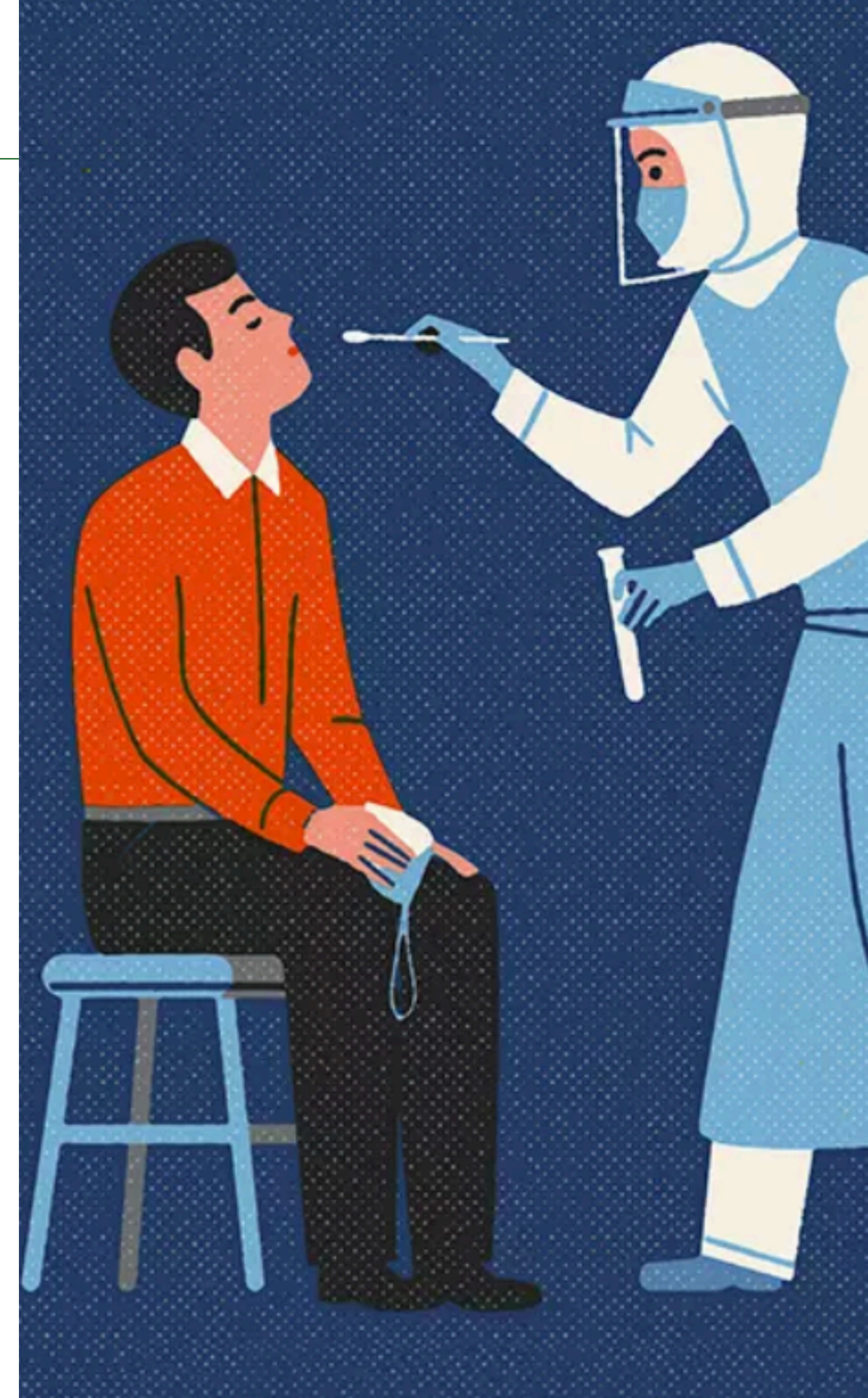
Using our “Collective Intelligence” methodology which combines three primary data sources (quantitative, qualitative and analytics) we focused on understanding key behavior indications of Covid-19’s impact on commerce, culture and our personal lives- in conjunction with the development/ deployment of a Covid 19 Vaccine. This study focused on the US only.

EXECUTIVE SUMMARY

People are burnt out. For those still working, they're struggling to get away from work because remote work stays with us at home and some admit, to working even longer hours than their pre-pandemic workload.

We're spending almost 40% more on at home delivery services. In addition, we're spending 60% more daily time on our screens- leading to a massive shift in how we now consume products and content.

Feeling towards taking the Vaccine are not widely accepted yet. Further, deployment of the Vaccine is very behind schedule and at this current rate, we won't return to "normal" until some time in 2022 or possibly 2023. To that, we believe some variation of the "new normal" is here to stay.



HOW PEOPLE ARE FEELING



With financial pressures looming, many are grappling to find a healthy work/life balance. As mounting effects of home lockdowns continue, some are doing their best to manage things with their family and are feeling very overwhelmed.

MENTAL HEALTH IS 'TANKING'

The pandemic is really hitting some people incredibly hard and they're struggling to find healthy coping mechanisms to fend off depressive episodes. Younger people are especially grappling with their dark days.

80%

18-35 year olds reported
"significant depression symptoms"

76%

Struggling with Anxiety

58%

Have increased
alcohol consumption

A DIVIDED NATION


POLITICO

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CONGRESS

How Trump's second impeachment will work

Here's why Democrats are dashing to remove the president days before his term ends, and what it means to hold a trial if Trump has already left office.



CNN politics Live TV

13 charged in plot to kidnap Michigan Gov. Gretchen Whitmer

By Christina Carrega, Veronica Stracqualursi and Josh Campbell, CNN

Updated 10:32 PM EDT, Thu October 08, 2020




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DC updates: 4 dead, 52 arrested, 14 police officers injured after pro-Trump rioters breach US Capitol; FBI opens investigation

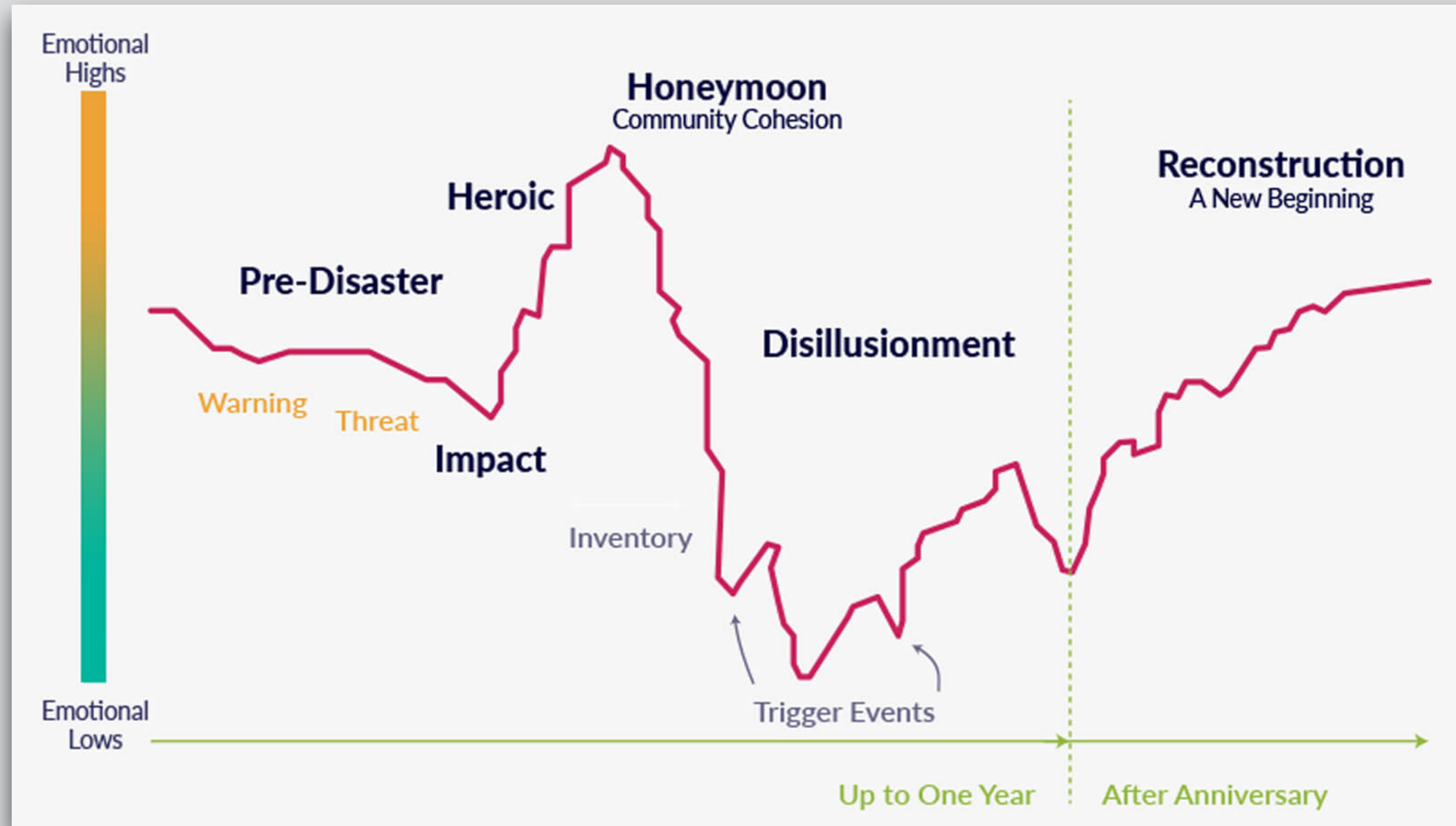
N'DEA YANCEY-BRAGG, JOHN BACON, RYAN W. MILLER, JORGE L. ORTIZ, TREVOR HUGHES, GRACE HAUCK, WILL CARLESS AND JORDAN CULVER | USA TODAY | 9:33 am EST January 13, 2021

txt f t e



For the last couple years, political divide and rabid tensions have fueled aggressive actions by embolden groups. While people of color and minority groups, charge to counter staunch hate, with love and optimism for a more balanced nation. A Biden/Harris administration has plans of unity for a more cohesive country.

COVID-19: AN EMOTIONAL ROLLERCOASTER



* Zunin & Myers. 2000

Pivotal emotional triggers are indicative of how we're all coping with the pandemic waves, the actions we're taking highlight when our decisions coincide with the external world. Not all people are experiencing the same stages at the same time and some are stuck in disillusionment.

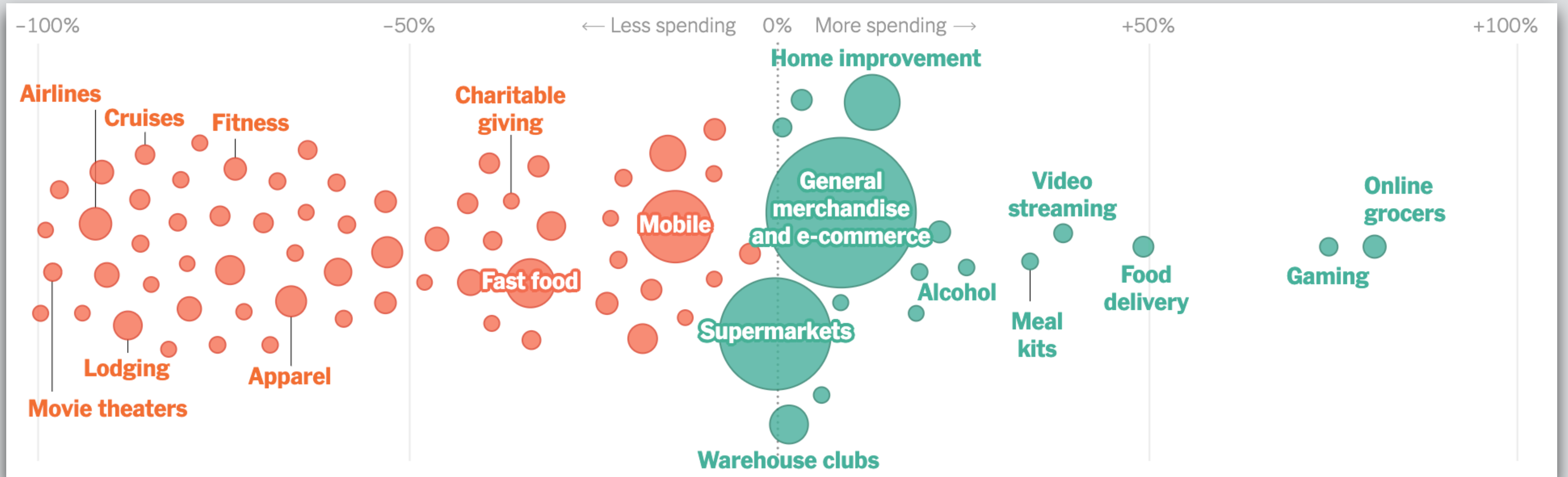
HIS'TORIC ECONOMIC SWINGS



The screenshot shows a MarketWatch article page. The header includes the MarketWatch logo and a navigation menu. The main headline reads: "Amazon has already had its most profitable year ever, and just set a record for sales in a quarter". Below the headline, it states "Last Updated: Oct. 29, 2020 at 5:59 p.m. ET" and "First Published: Oct. 29, 2020 at 4:15 p.m. ET". The author is listed as "By Jeremy C. Owens". The article text begins with "Amid pandemic surge, Amazon has already outpaced 2019's record annual profit ahead of fourth quarter that will include Prime Day as well as Black Friday and other holiday shopping".

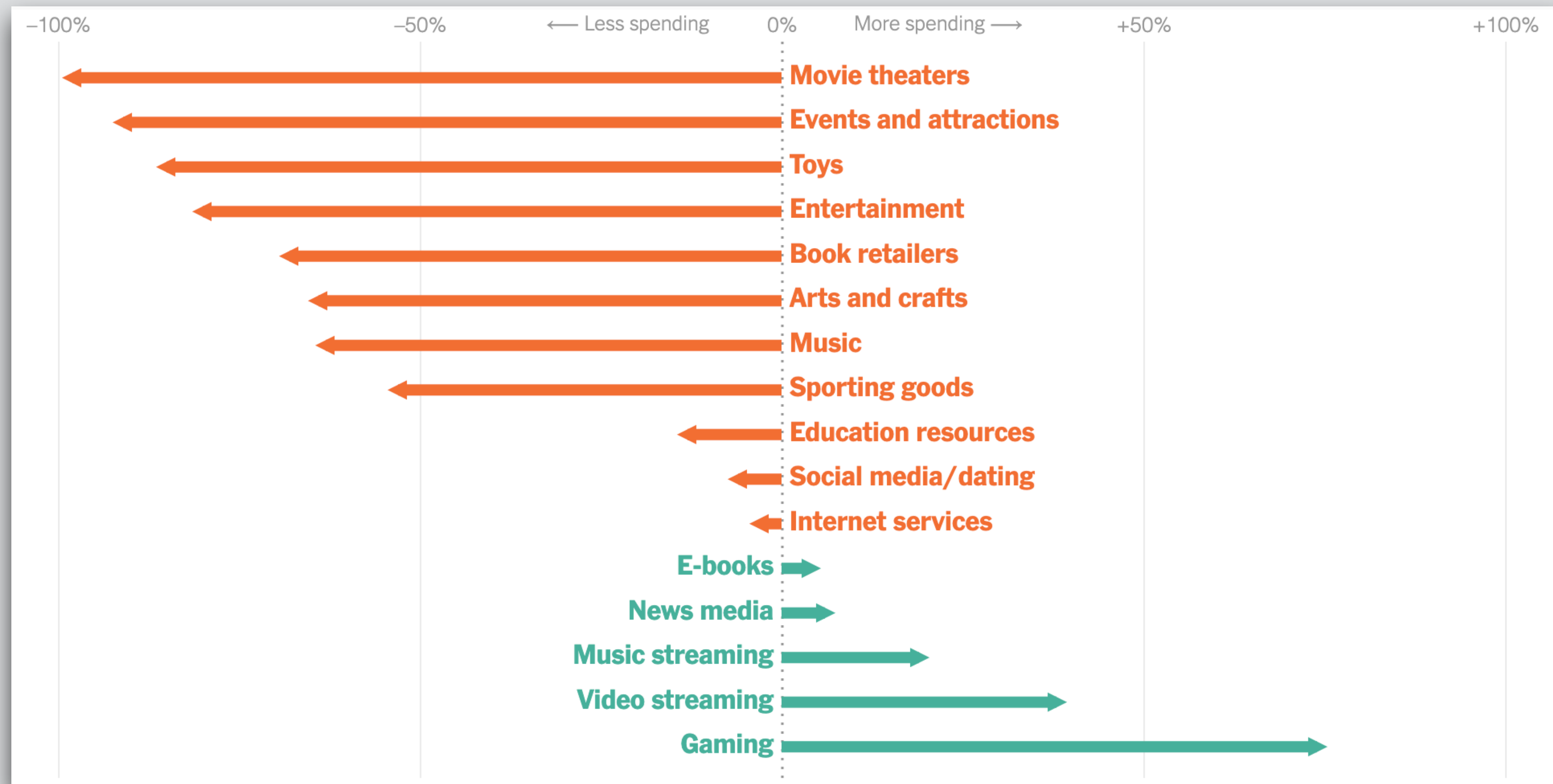
With an influx of ecommerce activity, some categories like Food/Bev brands are up 42% *. While others categories like restaurants and commercial real estate are struggling to keep the doors open.

NOT ALL CATEGORIES ARE THRIVING



With travel restrictions and events on hold, at home entertainment and ecomm food are seeing their largest growth in history. By far, e-commerce is seeing the biggest sales growth.

DOLLARS ARE GOING 'TO SCREENS



As lockdowns have increased our screen time to record setting levels, categories like eSports and streaming services are soaring far beyond initial expectations.

COVID-19: TRIUMPHS AND FUMIBLES

SFGATE
BAY AREA & STATE

California has the most vaccines of any US state; it has used only 27% of them

Amy Graff | on January 12, 2021

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THE WALL STREET JOURNAL.

BUSINESS | HEALTH CARE | HEALTH

Covid-19 Vaccine Trial Volunteers Note Occasional Harsh Side Effects

Most report mild side effects, but those experiencing worse still recommend the shots



BUSINESS INSIDER [Subscribe](#)

Moderna's groundbreaking coronavirus vaccine was designed in just 2 days

Susie Neilson, Andrew Dunn, and Aria Bendix Dec 19, 2020, 11:51 AM

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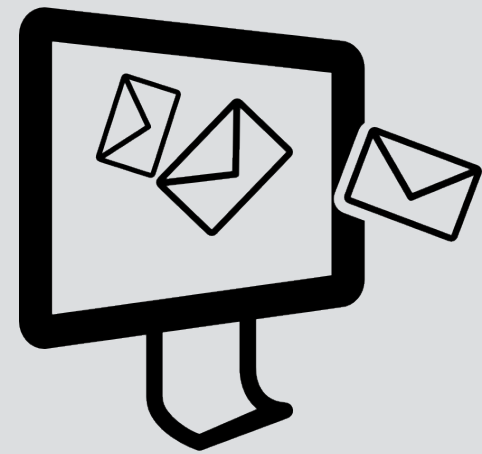
Pfizer expects delivery of 200 Million Vaccines by 07/01/2021- which would only cover 100 million complete vaccinations. First priority group will include frontline healthcare workers and the elderly. General public most likely won't have access until late summer 2021.

COVID-19: 'THE FINISH LINE..'

While it's possible to reach herd immunity at the end of 2021- it will still take time for pandemic culture to subside. Meaning, not all people will feel comfortable being around the public population in confined spaces until herd immunity is reached- sometime in early/mid 2022.

Feb 2021	50 million more in the priority groups get vaccinated. As more shots become available, priority groups expand to include: people over 65, and those with preexisting conditions.
Mar. – Apr. 2021	Vaccine distribution to priority groups continues.
May – Jun. 2021	Vaccines become more widely available to young, healthy members of the general public.
Jul. – Sep. 2021	Most adults in the US who want a vaccine likely have access at this point. But, remember, many coronavirus vaccines require 2 shots to become fully effective. The vaccination process can take 3–4 weeks per person.
Oct. – Dec. 2021	Herd immunity through vaccination could be reached in the US, if 75% of people (or more) get their shots.

COVID-19 TAKEAWAYS

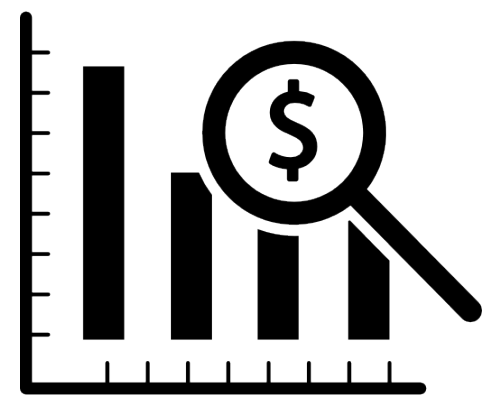
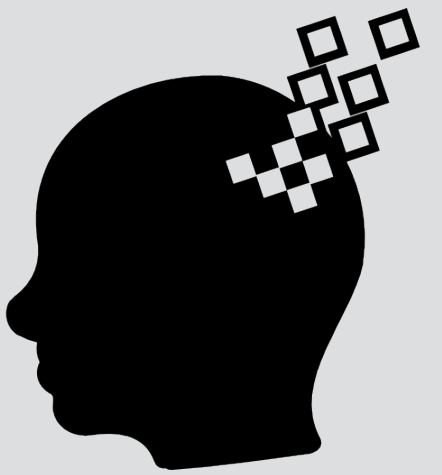


Inbox deals aren't enough:

Create captivating ways to stand out when inboxes are flooded daily

Peak tensions have a trickle effect:

Understand how the external world impacts our home life and showcase ways a product alleviate stresses or bring moments of joy



Focus on most needed products:

Double down on categories that are thriving inside the home will actually drive revenue

Create a plan to reach 2022:

Expect much more of the same restrictions until we reach herd immunity. Brands that are positioned to align with culture now, will bounce back much faster



COVID-19 PROJECTIONS

Democratization of brands:

Decline in brick & mortars have lead to a thriving DTC culture and show what's possible if brands create products people actually need and can get them to people quick



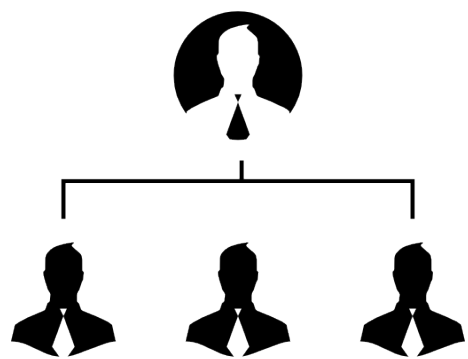
Commercial real estate flops:

Remote work will force large corporations to downsize and re-think how they utilize massive spaces, that are now empty



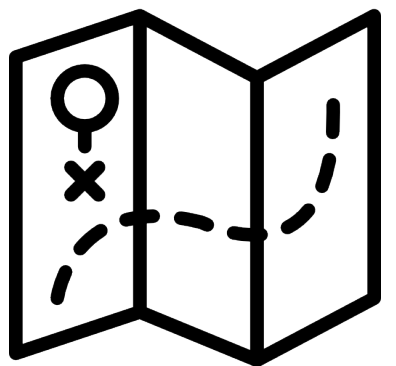
Socio-economic class polarization:

In many cases, the wealthy haven't been as directly affected by the pandemic as the working class and that's shown in their spending behaviors



The “new normal” is here to stay:

Expect some variation of work-from-home culture to continue after the pandemic and strong dependence on DTC shopping



COVID-19 'TRENDS' THAT 'STAY'

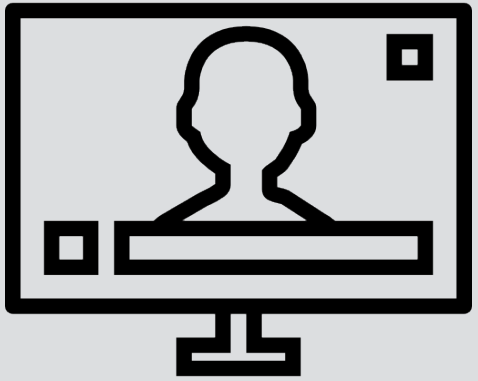


Touchless economy:

Mobile payments, click and collect, and fast checkout solutions will all become an expected option going forward

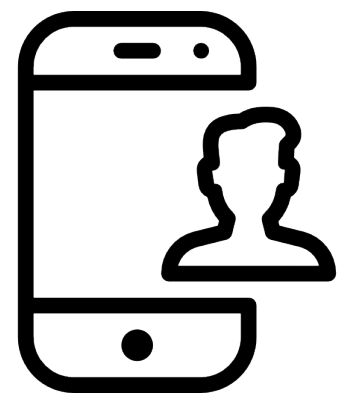
Working remote:

The Pandemic just accelerated culture and proved working from home can be effective and will open talent pools outside of previously restricted zip codes



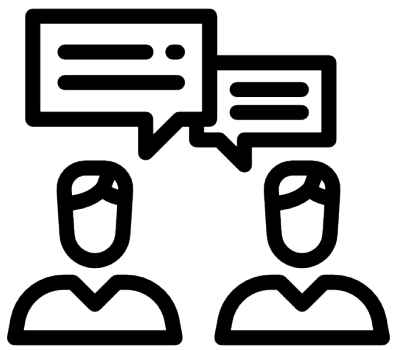
Digital path to purchase tools:

A massive dependence on ecommerce and delivery services have fortified essential shopping platforms. Many online retailers will need to offer their customers at home delivery through their mobile to stay competitive



Brands must have a stance:

Political tensions have highlighted how important social issues are to most consumers. Brands will be expected to have a perspective on major social issues, as consumers “vote” with their wallets





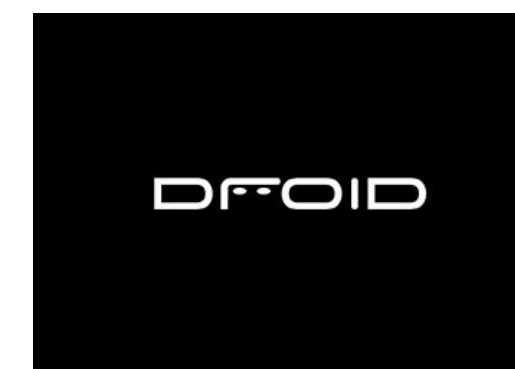
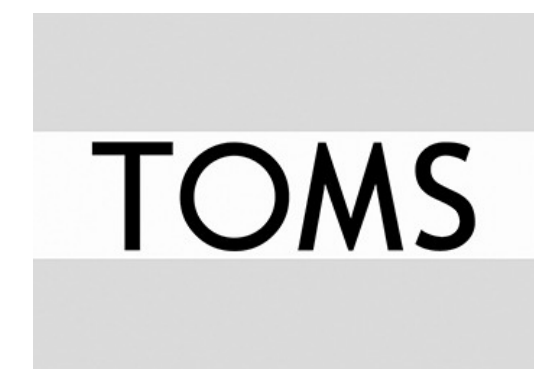
ABOUT FURTIVE COLLECTIVE

We create progressive solutions for future-forward brands.

Some brands have faced challenges spanning perception issues to lack of sales and anti-trust concerns. Others have rich brand equity that has simply grown stale with time.

We don't believe in guesses because, data drives everything for us and we love to solve problems big and small. We do that by using NASA created software to pin-point validated opportunities which create quantifiable scale.

No matter the state of our clients, the work we do is always centered around the health of the brand; where it is, where it's going, what it aspires to be and its impact on consumers lives.



**'TO LEARN MORE ABOUT'
HOW WE CAN HELP,
GIVE US A SHOUT'.**



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