

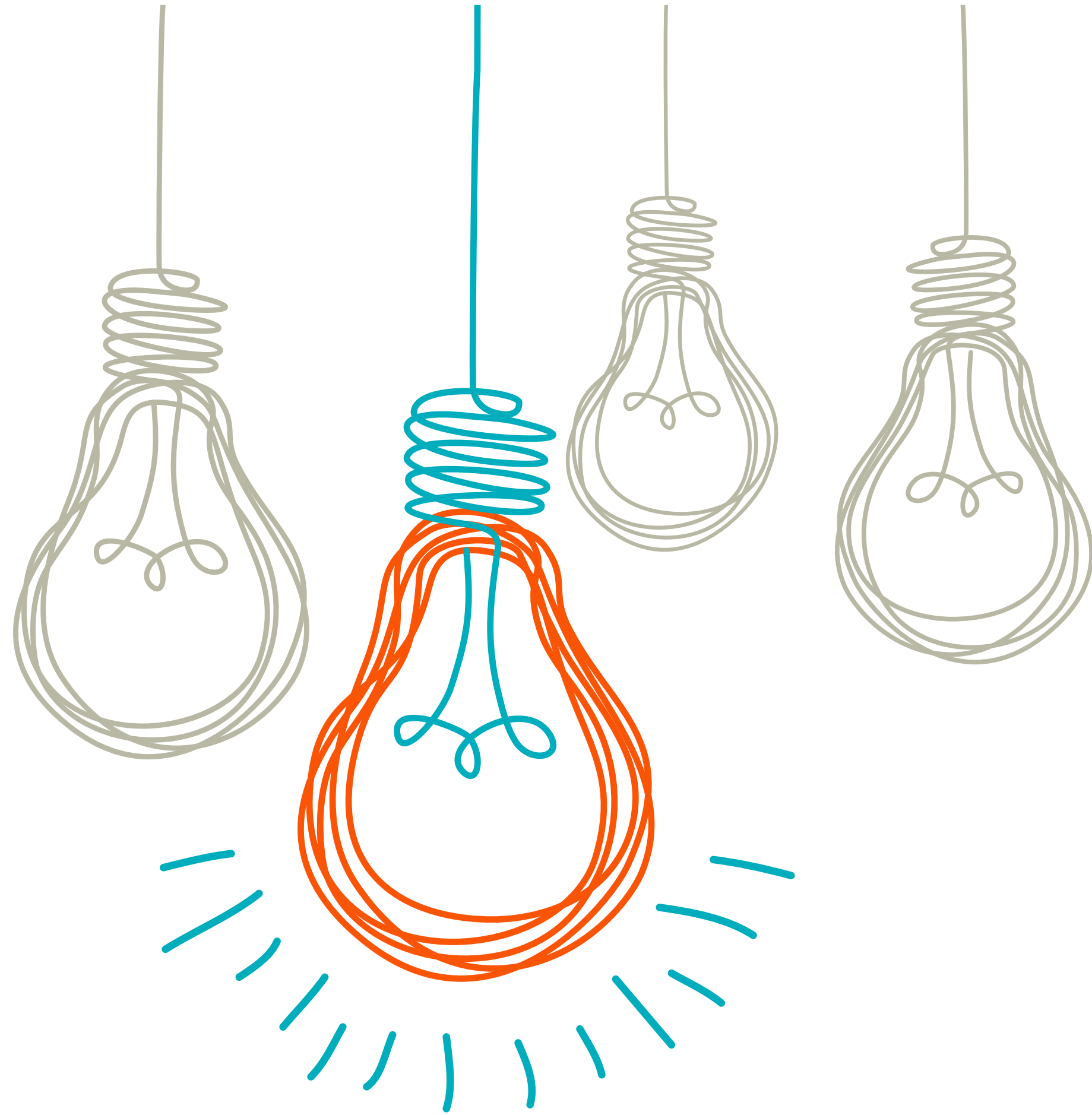
# THE FUTURE OF LARGE GATHERINGS



# PURPOSE AND METHODOLOGY

# ISSUE

As an approach to mitigate the transmission of COVID 19, governments around the world have imposed restrictions on public gatherings. SLD wanted to study what longer term effect the pandemic could have on the nature of gatherings. We also wanted to explore other issues that could have an equally disruptive impact.



# HOW TO USE SCENARIOS

Scenarios are a glimpse into possible futures.

They are **not predictions**. They are explorations of various ways in which the future might unfold.

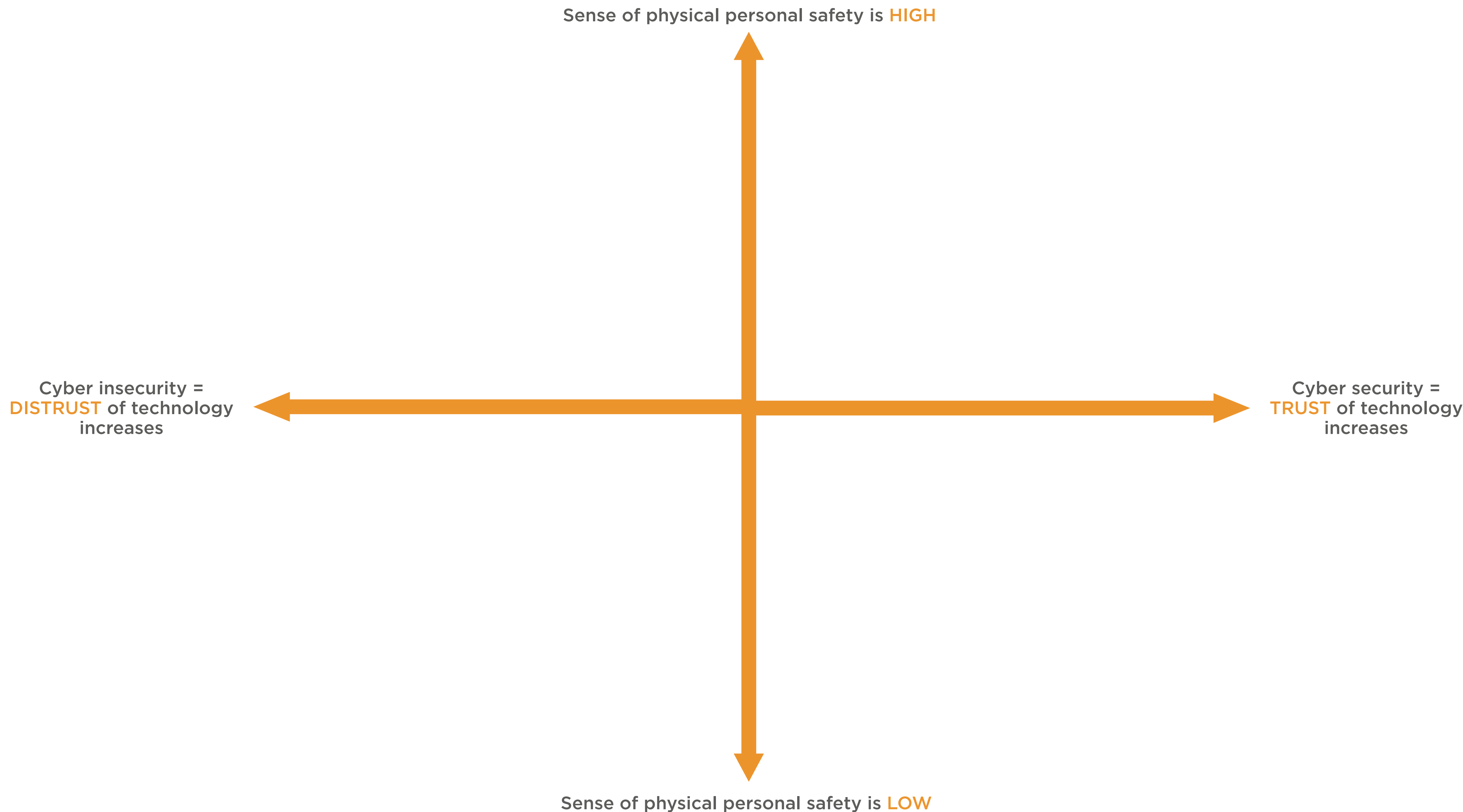
Scenario planning can be a useful tool to build a shared vision of the future. They are meant to **challenge our assumptions, probe possibilities** and **stimulate conversation** about even the most uncomfortable ideas.

The purpose of exploring these scenarios is to fuel our collective imagination to anticipate, innovate and create opportunities for the future of any business that brings people together.



# SCENARIOS OVERVIEW

Our scenarios were built by identifying two **critical uncertainties**, each of which describes a potential deviation from the status quo of public gatherings.





Sense of physical personal safety is **HIGH**

ONLY HAPPY IRL



IGNORANCE IS BLISS



Cyber insecurity =  
**DISTRUST** of technology  
increases

Cyber security =  
**TRUST** of technology  
increases

COCOON LIFE



DIGITAL BUBBLE



Sense of physical personal safety is **LOW**



## ONLY HAPPY IRL

They call it the Big Disconnect. We all thought we were in the clear when the vaccine rolled out... but then a series of cyber attacks, massive data breaches and cyber espionage pulled the digital rug out from under our feet. Suddenly, we only felt safe face-to-face, IRL.

Internet borders close, nationalism and regionalism rise, and local community becomes the main social platform. Printed news, burner phones and personal vehicles are back with a vengeance. For some, this new world order isn't a big deal because they enjoy the human connection. But there's a dark side to this happy community picnic.

Technology and innovation become segregated and secretive. If innovations are happening, we don't know what they are. We go from a sense of global connection to a local mindset, limiting innovation and progress of the human race.





## IGNORANCE IS BLISS

Welcome to the party! The roaring 20's are back as COVID-19 is eradicated and people celebrate with abandon. Nightclubs, concerts, shopping, eating out, all enjoyed with the support of connected technology that delivers a thrilling experience to consumers who want to taste it all.

Life is good and returning to a new happy normal, with COVID-19 becoming a chapter for the history books. Or so it seems.

Consumer trust is so high that it leads to a blind naivety, leaving people vulnerable to unethical brands, foreign interference and cyber-insecurity. This allows China to take advantage and assert its power on the global stage.

Feeling like life is grand makes trying to focus on “negatives” like the environment or social justice less interesting to the fickle public. Life IS grand. But that could all change at any moment....



# DIGITAL BUBBLE

Technology finally rules us all. Social unrest, an untreatable virus and political divisions make the virtual world a much safer one than the world outside our doors. Tech companies rise in power, with innovations in cyber-security boosting trust. People feel more and more comfortable exchanging data, handling finances, learning, working and socializing online.

The isolation does take a toll and many people opt out of city living. Staying within a social bubble allows for limited interaction, making outdoor activities, dining and events preferable.

Despite hopes that the digital world may even the playing field and create a more balanced society, the rich continue to get richer. The digital world also furthers the divide between people, with differing ideologies, backgrounds, and social status' becoming even more noticeable.



# COCOON LIFE

Being safe is everything. The COVID virus mutates, becoming more dangerous, while cyber attacks push us offline. Safety shields and air-filtering umbrellas become as common as winter coats. Tech innovations to improve online safety exist, but are prohibitively expensive. The social cocoon - a more closed social bubble - becomes an intrinsic fact of life.

Communities become increasingly tight and insular, and local networks become a life-line to positive experiences. The global economy crumbles and new modes of commerce struggle to take root, with local militia groups vying for power in many places. It sounds all doom and gloom, but there is a big positive.

With less travel and energy usage, global emissions begin to drop. Climate change becomes less likely to have catastrophic consequences as we slow the pace of rising temperatures.



# SCENARIOS DEEPER DIVE

# HOW DO LARGE GATHERINGS PLAY OUT IN EACH OF THESE SCENARIOS?

In this section we explore each of the four scenarios in greater depth and ask ourselves the following questions:

- What are the signals of change to watch out for that could indicate this scenario is coming to life?
- How would this scenario impact each of the STEEPV categories (Social, Technological, Economic, Ecological, Political, Values)?
- How will this impact large gatherings?
- What new customer needs would emerge?
- What does the new customer journey look like in this scenario?





# SCENARIO 1: ONLY HAPPY IRL

Sense of physical personal safety is high  
Cyber insecurity = trust of technology is low



## ONLY HAPPY IRL SIGNALS OF CHANGE

- Cyber attacks on infrastructure, such as power grids, transportation and communications.
- Countries take measures to segregate infrastructure.
- Financial cyber-insecurity becomes rampant and hard to control.
- Consumers opting out of sharing data, 5G.
- Increased interest in private social networks.
- A series of “disasters” that are linked to technology, such as data breaches and autonomous vehicles causing deaths.
- Decline in power of the anti-vaccine movement.
- Increased political interference from Russia/China/other.
- Decline in cell phone and tablet sales.

**HOW WILL  
WE KNOW  
IF THIS  
SCENARIO  
IS COMING  
TO LIFE?**



## SOCIAL

Out in the neighbourhood, on city streets, in bars, cinemas, galleries and restaurants, life is about rich in-person connections and celebrations.

- In-person +
- Service +
- Social media -
- Retail locations +
- Phone calls +



## TECHNOLOGY

Connected digital technology is disrupted, making analog/offline hybrids the new area for innovation.

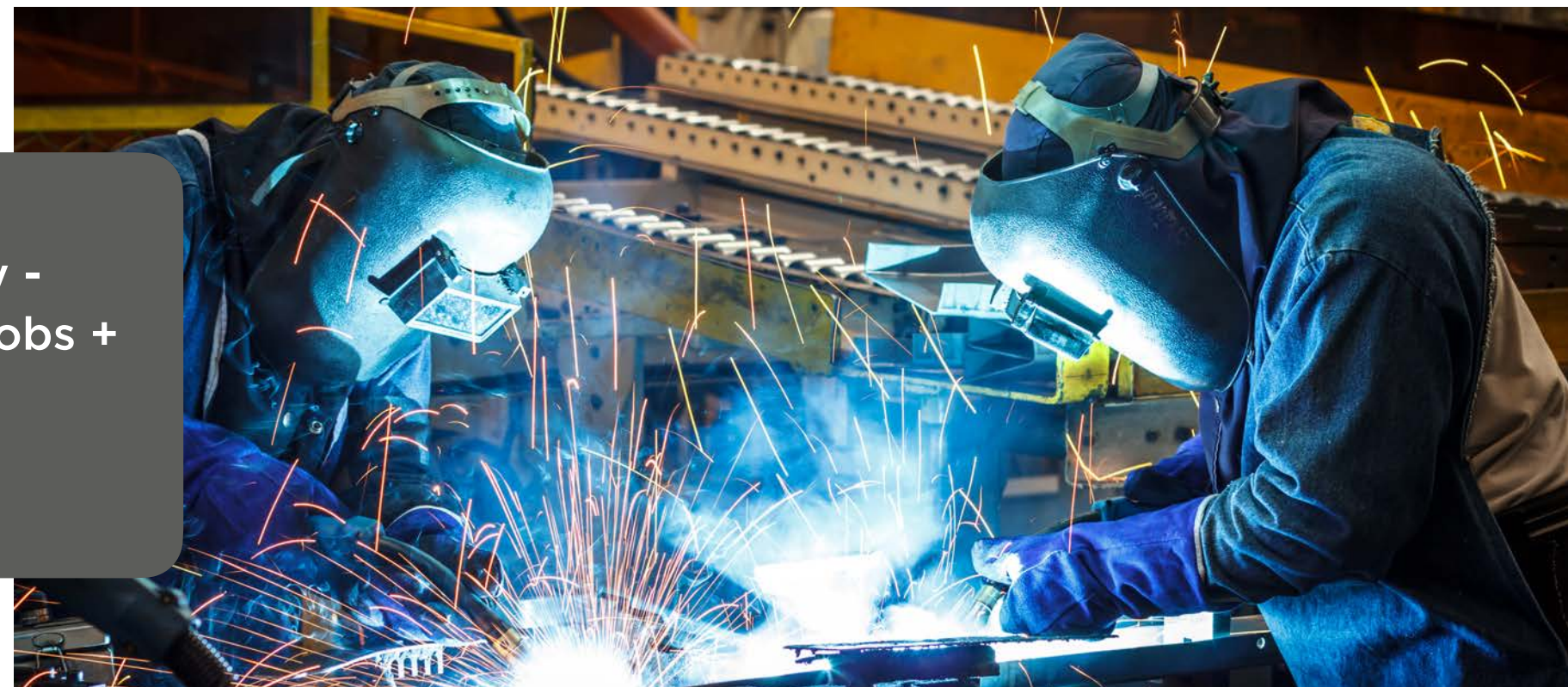
- Digital cost +
- In-store micro - manufacturing +
- Connected devices -
- E-commerce -



## ECONOMY

Global commerce retreats into regional pockets and local economies are forced to become more self-reliant.

- Global economy -
- Manufacturing jobs +
- Tech jobs -
- Auto industry +





## ECOLOGY

Local increase in traffic and manufacturing as well as disruption to the power grid push a shift to green energy.

- Green energy +
- Off the grid +
- Public transit -
- Local +
- Traffic +



## POLITICAL

A digital cold war causes a fractured globe that embraces nationalism.

- Knowledge sharing -
- East/West tension +
- Nationalism +
- Automation -



## VALUES

People become more connected to their communities and are happier - but they are largely unaware of what is going on in the outside world.

- Made here +
- Human interaction +
- Outdoors +
- Local talent +
- Life online -





IN PERSON BECOMES THE MOST IMPORTANT CONSUMER TOUCHPOINT





# ONLY HAPPY IRL IMPLICATIONS

## THE NATURE OF GATHERINGS WHEN WE'RE ONLY HAPPY IRL

- People will enjoy in-person interactions and shift away from interactive digital experiences, **preferring one-way digital engagement**.
- People will seek adventure within their own region - disruption to transportation may limit travel, so **real estate assets matter more**.
- Physical urban indoor and outdoor spaces become popular spaces for socializing, as well as private spaces where people can gather formally and informally.
- Novel, engaging experiences that **facilitate meeting new people** become popular as social media moves away from open platforms and online dating sites become less trusted.
- A sense of **bustling local activity** rises as people go out onto the street to chat and connect with neighbors in casual, chance meetings.

## CONSUMER PRIORITIES

- Frontline workers play a stronger role as **service excellence is required** to fill the gap lost through digital channels.
- Digital channels become places to browse and find information, but consumers are wary of e-commerce and data collection.
- The collection and use of **consumer data becomes a big no-no**. Personalized service in-store becomes the new version of personalized digital experiences.
- Supporting local manufacturers and businesses becomes more important to consumers as global tensions rise.
- Consumers are still looking for **innovation and excitement in a new analog-digital model** that doesn't have to be "connected."
- Consumers want to live close to amenities and their place of work.

# ONLY HAPPY IRL CUSTOMER JOURNEY STAGES

## STAGE 1: ATTRACT

### Brand Consideration and Awareness

- Print ads and billboards see a revival - consumers want authentic marketing that has a purpose beyond selling stuff.
- Digital signage and interactive experiences will still be relevant as long as it is clear they do not collect consumer data.
- Consumers want new, exciting experiences: micro-manufacturing and 3D printing of customized products are examples.

## STAGE 2: TRANSACT

### Customer Service Experience

- Real estate assets are a huge advantage - design and experience are critical.
- Global supply chains are unreliable, so a local supply chain is important to ensure day-to-day demands can be met.
- Secure payment methods and/or a return to hard cash - customers want options.
- VIP customers could have access to a highly secure digital experience that comes with a price tag.

## STAGE 3: RETAIN

### Support and Community

- Brands will have to rethink their staffing model - including skills, training and compensation - as frontline staff become the primary consumer touchpoint.
- Being highly visible in the community and supporting local will be very important.
- National, regional and local pride drive brand preference.

ONLY HAPPY IRL... THE BIG PICTURE

**BUSTLING STREETS**

**ALIVE WITH  
ACTIVITY MAKE IT A  
GREAT TIME FOR  
LARGE GATHERINGS**





## **SCENARIO 2: IGNORANCE IS BLISS**

Sense of physical personal safety is high

Cyber insecurity = trust in technology is high



# IGNORANCE IS BLISS SIGNALS OF CHANGE

- A vaccine is developed and rapidly distributed with a high level of success.
- Regulation of tech companies hits a balance between innovation and public safety.
- Companies are able to address cyber-attacks to a reasonable extent.
- Political interference in elections is mitigated through new technology that catches bad actors on the internet.
- Economy stabilizes, consumer confidence and employment is high for the next five years.
- Automation and “smart” technology begins to roll out more widely.
- Politicians take a soft approach with China.
- Widespread adoption of 5G.

**HOW WILL  
WE KNOW  
IF THIS  
SCENARIO  
IS COMING  
TO LIFE?**



## SOCIAL

People head out in hoards to attend events, parties and gatherings, all of which are facilitated by smart devices and digital innovations.

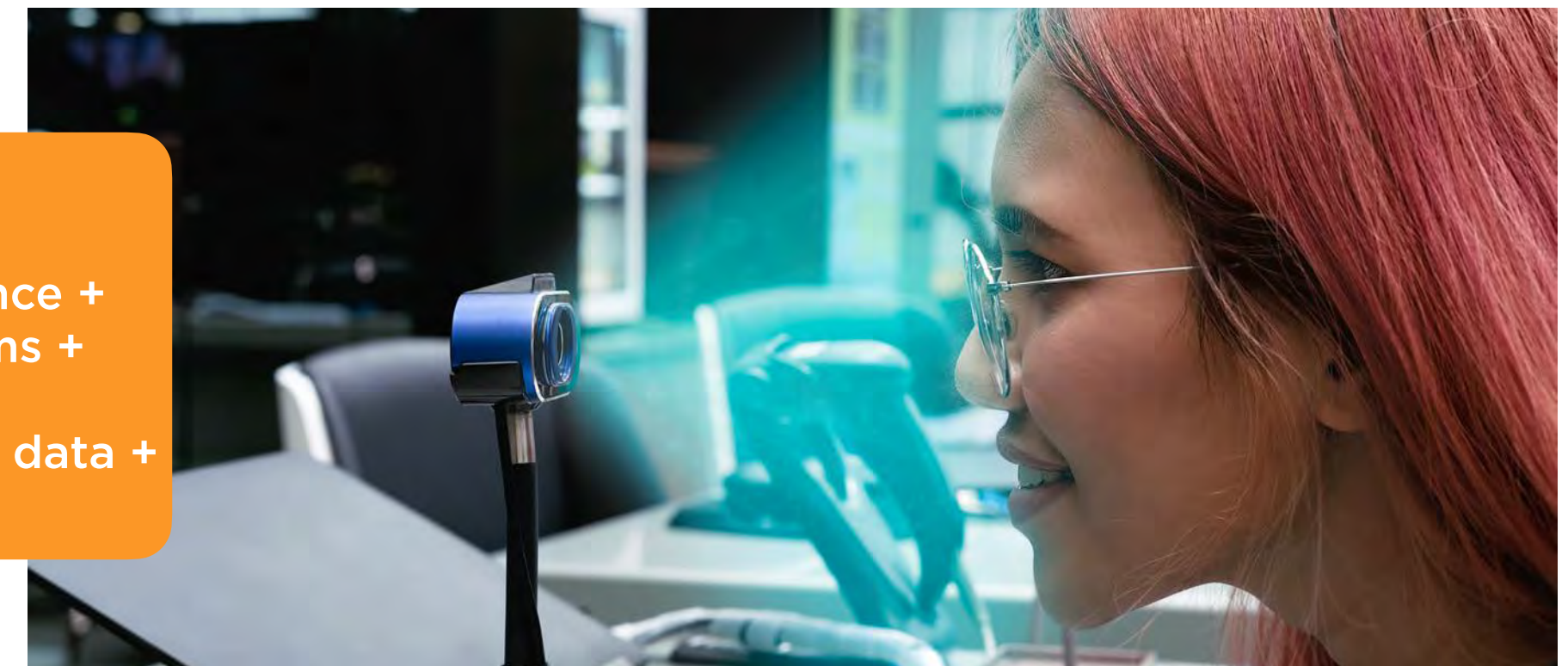
- In-person +
- Service +
- Cell phone usage +
- Inclusivity +
- Urban Density +



## TECHNOLOGY

Innovations come at break-neck speed with little resistance, as self-driving cars, biometric security and smart homes become common.

- Automation +
- Digital convenience +
- Digital ecosystems +
- Touchless +
- Sharing personal data +



## ECONOMY

Slow regrowth pushes class division further apart, forcing new business models and new economic strategies, such as Universal Basic Income.

- Widening separation between classes +
- Value focus +
- New business models +
- Innovation +





## ECOLOGY

Though people are happy about spending more time outdoors, fun and convenience trumps concerns about the environment.

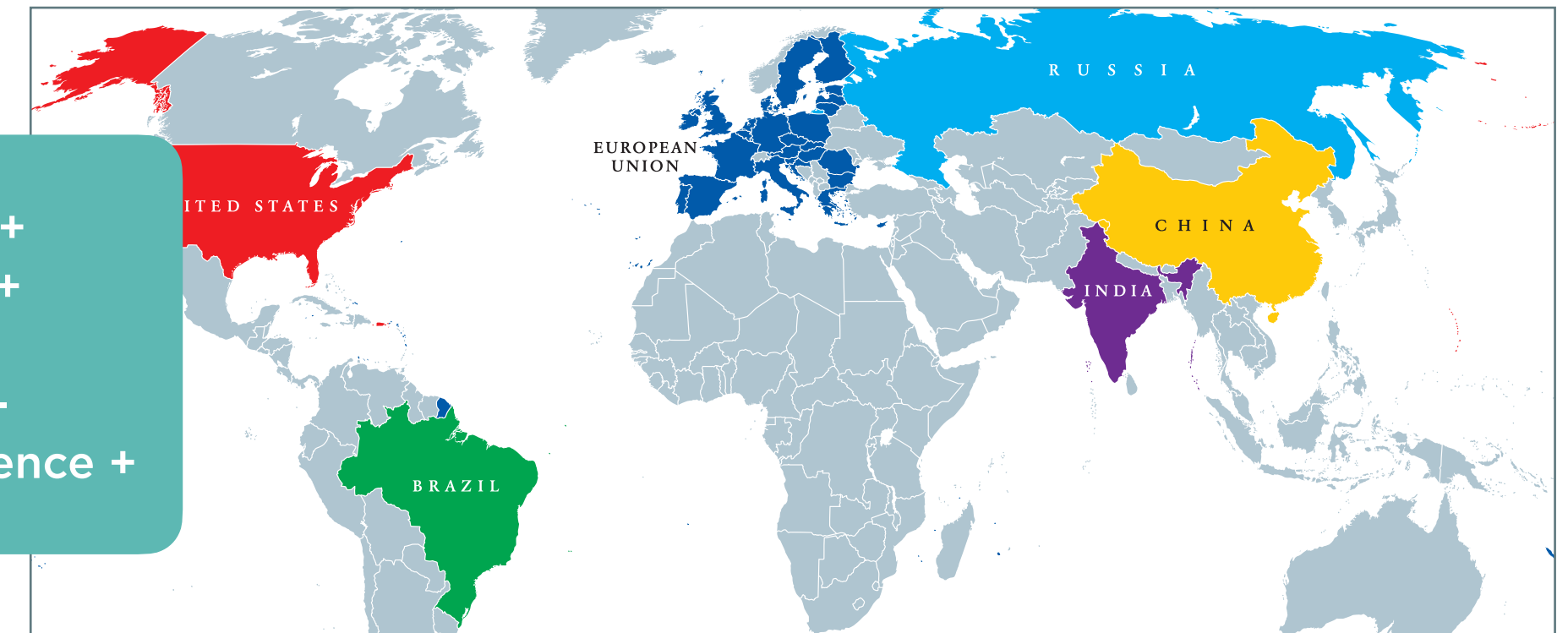
- Eco-awareness +
- Walking/Biking +
- Environmentally friendly lifestyle -
- Fun over focus +



## POLITICAL

Interest in politics becomes apathetic, with citizens turning a blind eye to surveillance and online disinformation and interference.

- Political apathy +
- Asian Influence +
- Surveillance +
- Western Power -
- Foreign interference +



## VALUES

An initial surge of optimism inspires - but a struggle for work/life balance returns with a vengeance.

- Optimist mindset +
- Authenticity +
- Deeper online relationships +
- Burnout +





WORK HARD / PLAY HARD IS NEW AGAIN





# IGNORANCE IS BLISS IMPLICATIONS

## THE NATURE OF GATHERINGS WHEN IGNORANCE IS BLISS

- A **seamless omni-channel strategy** is needed to create an exceptional experience for gatherings - essentially an acceleration of the omni-channel experience we see today.
- People demand rich, exciting experiences, regardless of whether it is a value or luxury setting. People will enjoy novel technology-mediated physical experiences, such as sensory tech.
- Artists, innovators, live performances and events enhanced through technology keep people wanting more.
- The possibilities for gatherings are endless.
- **Brands will have to keep up with technology** to meet consumers wherever they are in their virtual or physical space.

## CONSUMER PRIORITIES

- As the economy recovers, **people may have less to spend** but have a strong desire to enjoy the finer things in life.
- As companies rush to meet their desires, consumers could become overwhelmed with the constant bombardment of competing messages. **Consumers are at risk for mental health issues and burnout.**
- Initially aggressive optimism gives way to a more balanced perspective, where nature, family and mental health become more important.
- Value and inclusivity are important to consumers - ostentatious luxury is frowned upon, **authenticity and “real” (accessible) experiences are preferred.**

# IGNORANCE IS BLISS

## CUSTOMER JOURNEY STAGES

### STAGE 1: ATTRACT

#### Brand Consideration and Awareness

- Brands will have to leverage technology and exclusive experiences to attract people to their physical footprints.
- Influencers and micro-influencers, authentic messaging and innovative offers will drive interest.
- Brands that ensure safety and security while offering premium quality experiences at great value will be preferred in this scenario of abundance.

### STAGE 2: TRANSACT

#### Customer Service Experience

- Exceptional service and creative omni-channel experiences will be expected as the competition for consumers' dollars becomes fierce.
- Personalization through predictive analytics will become essential.
- Improved virtual experiences allows for increased global commerce.
- Most transactions will be managed by technology.
- Venues must amp up their ability to handle tech-heavy integration.

### STAGE 3: RETAIN

#### Support and Community

- Expectations are high and consumers will want brands to provide them with the best experiences, all while aligning to their values.
- Digital ecosystems to support customers after a purchase or visit will be highly relevant.
- Being active and visible in causes that align to your brand values will be critical.



IGNORANCE IS BLISS... THE BIG PICTURE

**RICH EXPERIENCES**

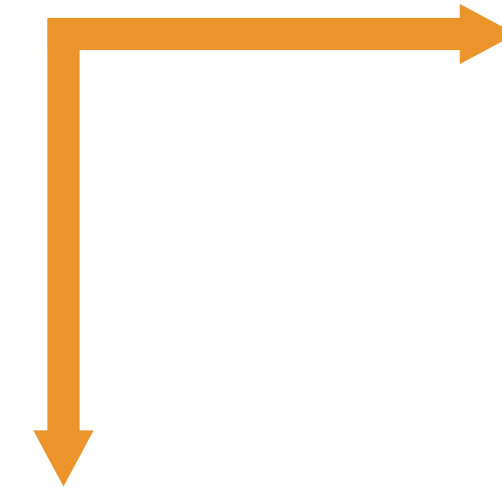
**BLENDING IRL &**

**DIGITAL AMP UP AS**

**CUSTOMERS WANT**

**IT ALL... AND MORE**





## **SCENARIO 3: DIGITAL BUBBLE**

Sense of physical personal safety is low

Cyber insecurity = trust of technology is high



# DIGITAL BUBBLE SIGNALS OF CHANGE

- Vaccination efforts are inconsistent and unsuccessful on a wide-spread global scale.
- WFH becomes an ingrained part of life, online learning becomes the status quo.
- Internet access becomes a human right.
- Violence frequently breaks out at public events.
- Advances in online security leapfrog over cyber-crime.
- People begin to travel less within their own region, staying closer to home.
- Automation in some service sectors becomes a safety factor.
- AR/VR becomes widely used and accepted, helping lower the cost of the technologies.

**HOW WILL  
WE KNOW  
IF THIS  
SCENARIO  
IS COMING  
TO LIFE?**



## SOCIAL

Fear of health and safety pushes people to live online through virtual worlds and tech devices as much as possible, seeing only those in their personal bubble IRL.

- Virtual gatherings +
- Cell phone usage +
- Shopping online +
- Social tension +
- In-person VIP +



## TECHNOLOGY

Advances in VR allow people to have more immersive, engaging experiences online in education, entertainment, sports and retail.

- Reliance on tech +
- Tech innovations +
- Personalization +
- Online events +
- Superapps +



## ECONOMY

Instability allows tech companies to challenge the global economy, vying to have their crypto-currency become the dominant global currency.

- Voting with wallet +
- Digital jobs +
- Government spending +
- Crypto-currencies +
- In-person job pay +





## ECOLOGY

Although traffic decreases, increased digital footprints impact the environment just as much and CO2 emissions continue to rise.

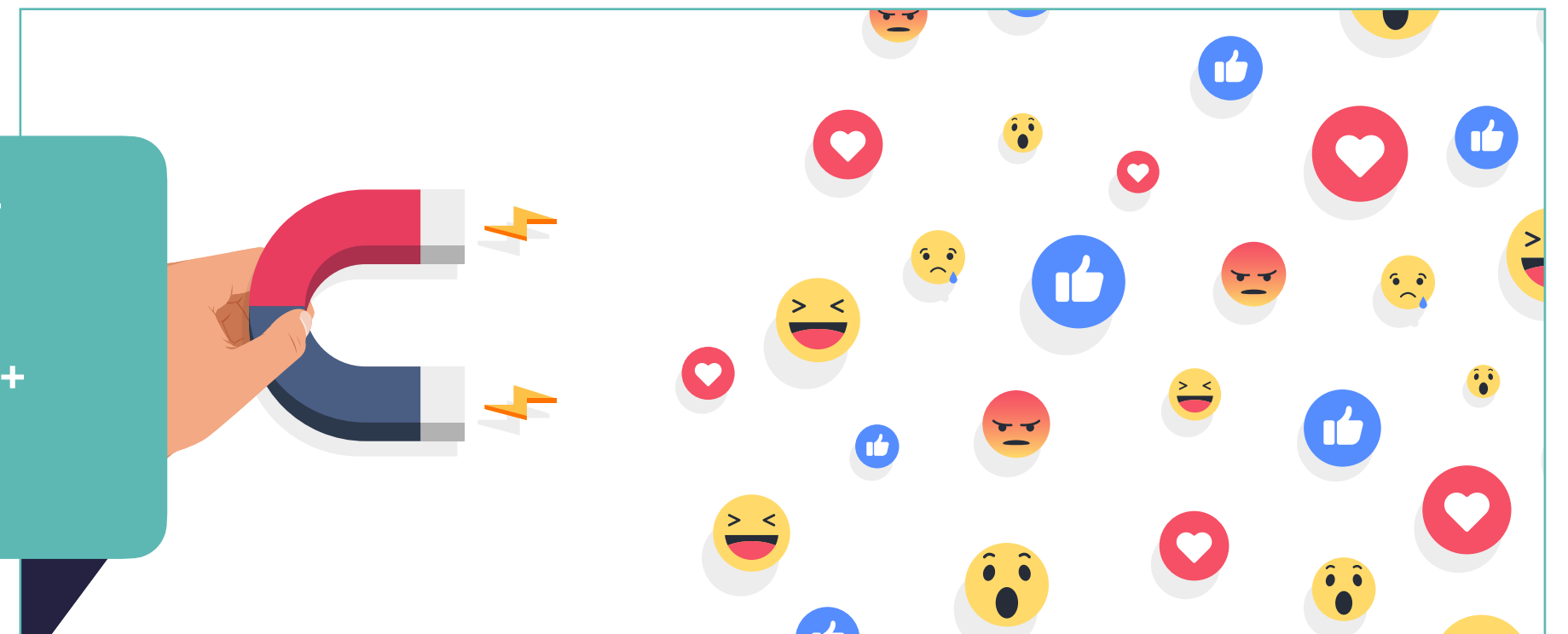
- Remote working +
- Moving out of cities +
- CO2 emissions +
- Electric vehicles +



## POLITICAL

Algorithms push people increasingly apart politically, while governments struggle to keep up with contested elections and advances in technology.

- Political divide +
- Tech company power +
- One sided news +
- Contested elections +



## VALUES

Mental health issues increase due to isolation, placing an increased importance on the strength of the personal bubble and the home as a sanctuary.

- Mental health issues +
- Value in possessions +
- Family/close friends +
- Home life +
- Domestic violence +





THE HOME BECOMES A SAFE HAVEN FOR SOME, A PRISON FOR OTHERS





# DIGITAL BUBBLE IMPLICATIONS

## THE NATURE OF GATHERINGS IN THE DIGITAL BUBBLE

- **Social interactions outside the close bubble will be mediated by technology.**
- Augmented and virtual reality will allow people to engage in **virtual worlds mimicking real life shopping and business experiences**. These new “places” will become the new high street, coffee shop, movie theatre etc. and will become highly valuable.
- Exclusive VIP experiences in real life will come at a high ticket cost, along with health insurance riders, instant health screening and immunity passes.
- At-home experiences for people within their close bubble will also offer brands opportunities to meet consumers in their own spaces.
- **In-person meetings become more “special”** and are reserved for occasions that warrant the higher cost/VIP customers.

## CONSUMER PRIORITIES

- Consumers will prioritize health, and therefore will be willing to give up more of their data and privacy in return for a seamless, enjoyable online experience that allows them to avoid in-person interactions.
- With interactions moving more online, **polarization of ideologies increases**, making it important for brands to tread lightly and ensure they are taking the best position based on their consumers’ perspectives.
- **The home becomes a valued space for consumers.**
- People live farther away from urban centers but still want **convenient delivery and access**.
- Personalization through predictive analytics becomes a key engaging with consumers.



# DIGITAL BUBBLE

## CUSTOMER JOURNEY STAGES

### ATTRACT

#### Brand Consideration and Awareness

- Brands will transition to a predominantly digital business model where their website and social media channels are their main sources of revenue.
- New digital ecosystems will emerge, creating a more seamless and interactive online shopping experience for customers.
- The rising popularity of super apps will provide new opportunities for brands.
- Virtual environments become a new platform for innovation around brand engagement.

### TRANSACT

#### Customer Service Experience

- Bricks and mortar businesses become appointment-only, VIP experiences for those who can afford it.
- Innovation in robot-manned service, drone delivery accelerates.
- Permanent social distancing in physical spaces allows some types of gatherings.
- Payments and transactions go online, with virtual currencies making all experiences accessible.
- Immunity passes and instant health screening allows some events to take place.

### RETAIN

#### Support and Community

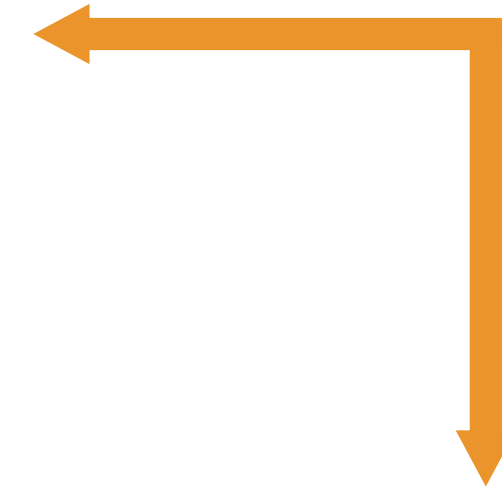
- Brands that inspire people by creatively engaging through technology will be leaders in this scenario.
- Bespoke subscription services become mainstream and connect to smart devices in the home for automatic reordering.
- Virtual mental health and communities supported by brands help alleviate loneliness, anxiety and improve brand affinity.



**DIGITAL BUBBLE... THE BIG PICTURE**

**VIRTUAL WORLDS  
BECOME THE NEW  
MALL, COFFEE  
SHOP & NIGHTCLUB**





## **SCENARIO 4: COCOON LIFE**

Sense of physical personal safety is low

Cyber insecurity = trust of technology is low



# COCOON LIFE SIGNALS OF CHANGE

- Vaccination efforts are inconsistent and unsuccessful on a wide-spread, global scale.
- COVID mutates and creates greater uncertainty, more pandemics occur.
- Increasing civil unrest.
- A rise in cyber-attacks and misinformation.
- Increasing concern over privacy and controversial uses of technology to access personal information.
- Travel, tourism and hospitality industries are completely disrupted due to health concerns.
- Emergence of new models of currency, both digital and community-based (such as barter).
- Rising power of local militarized groups.

**HOW WILL  
WE KNOW  
IF THIS  
SCENARIO  
IS COMING  
TO LIFE?**



## SOCIAL

An increased sense of danger pushes people into highly controlled and familiar environments, locking out the unknown.

- In-person +
- Internet -
- Local market +
- Crime, gangs +
- Gated/closed communities +



## TECHNOLOGY

Closed internet borders allow for some online interaction, but functional innovations as well as a return to analog systems are more relevant.

- Local utilitarian innovation +
- Surveillance +
- Closed internet borders +
- Cost of tech +



## ECONOMY

Capitalism can no longer exist in its current global form, and a fragmentation of economic systems leads to alternative modes for trade and commerce.

- Capitalism -
- Proximate communities trade +
- Barter +
- Self-reliance +





## ECOLOGY

A decline in global travel, trade, population growth and energy usage leads to an environmental recovery.

- Off the grid +
- Environmental health +
- Regulated gatherings +
- Travel -



## POLITICAL

Fragmented nations struggle to secure borders, while a rise in local militarized groups claim autonomy and compete with each other.

- Centralized power -
- City nations +
- Immunity passes +
- Militia competition for resources and power +



## VALUES

A severe shift in the world drives people to find solace in close-knit communities as well as traditional and new religions.

- Spirituality +
- Community networks +
- Interpersonal bonds +
- Trust and respect +
- Fragmented society +





A SENSE OF UPHEAVAL MEANS FAMILIARITY TRUMPS ADVENTURE





# COCOON LIFE IMPLICATIONS

## THE NATURE OF GATHERINGS IN COCOON LIFE

- **Hyper-local networks** will form the basis of community gatherings, limiting access to a trusted social circle.
- Those with **immunity badges** will be allowed to intermingle with groups outside their social circles and have special privileges and responsibilities of knowledge exchange.
- A total reinvention of the economic model leads to **fragmented, hyper-local modes of economic and community engagement**.
- Semi-outdoor structures allowing for circulation of air and social distancing become the primary preferred space for any sort of gathering.

## CONSUMER PRIORITIES

- Consumers will look to engage and maintain meaningful relationships within social circles, valuing health, networks and familiarity.
- **Decentralization helps maintain social cohesion** with a hyper-local focus on health, education and life-skills.
- A **mending environment** and pristine air and water are sources of positivity and pride.
- A rise in new spiritual expressions, both new and traditional, helps people cope.
- Exclusion based on health status becomes a hot political topic.
- **Safety from armed gangs and militia** becomes a concern in many areas.



# COCOON LIFE

## CUSTOMER JOURNEY STAGES

### STAGE 1: ATTRACT

#### Brand Consideration and Awareness

- Brands will have to establish stronger relationships with hyper-local community networks and collaborate with indie brands.
- Programming around special interests of regional communities will be crucial.
- Brands that participate in sharing technology and promoting frugal innovation at local levels will gain community trust.
- Security measures, both of the virus and armed gangs or militias, will become key.

### STAGE 2: TRANSACT

#### Customer Service Experience

- Brands will have to become flexible to allow localized currencies.
- Outside/semi-open spaces with weather-proofing will allow brands to create some physical experiences.
- The elite global market will offer brands access to wealthy clients who will expect a highly luxurious, exclusive and secretive experience hidden behind a high-tech firewall or in a remote location.
- People's mobility may become limited, meaning brands must go to the consumer.

### STAGE 3: RETAIN

#### Support and Community

- Brands will have to build relationships with community leaders to secure ongoing presence in community markets.
- Brands that demonstrate ethical actions will be favored.
- Brands will need to invest heavily on anthropology and ethnographic studies to keep up with various cultural beliefs, practices and ideologies.
- Huge shift in economic models mean new business models will be essential.



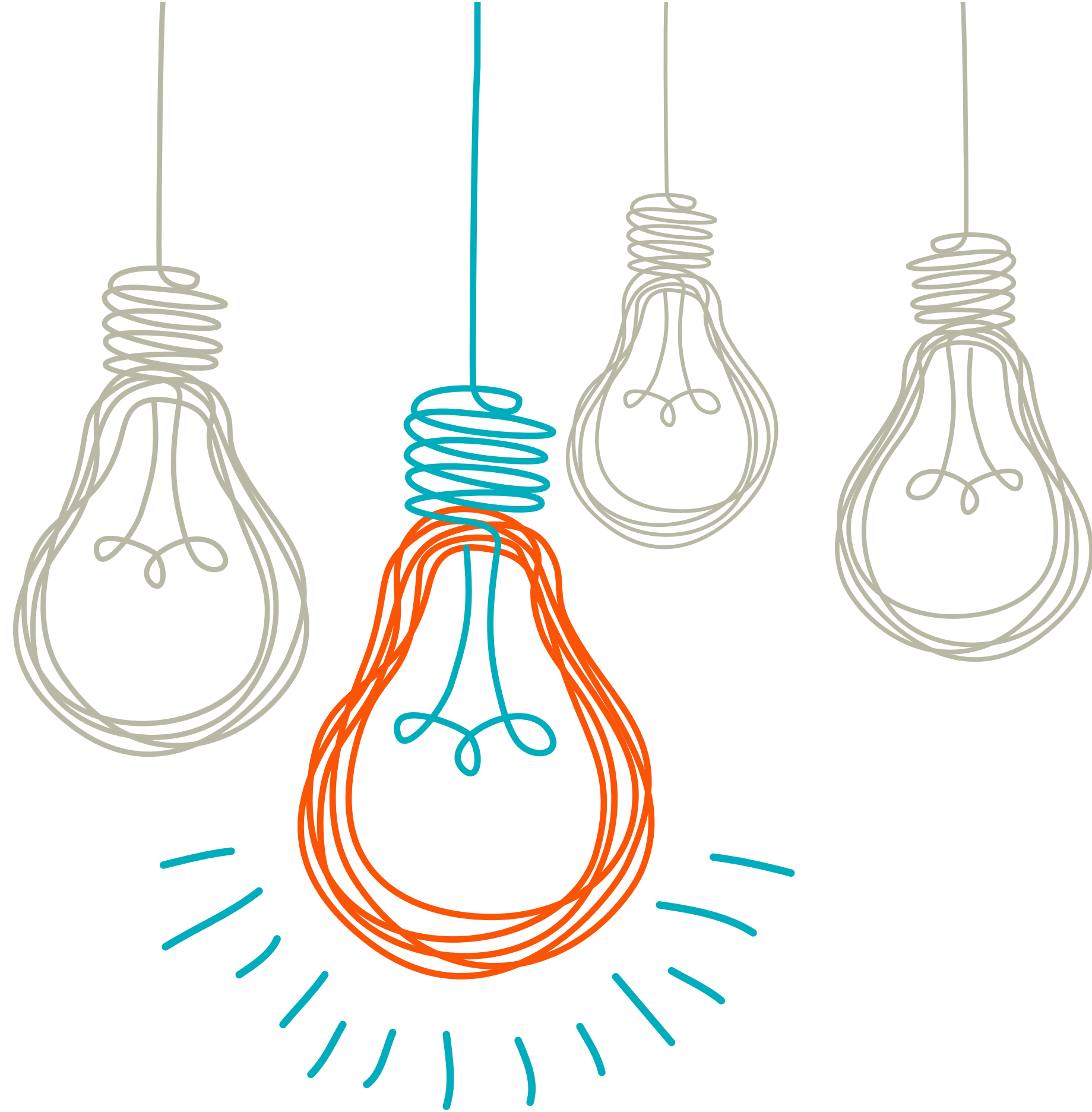
COCOON LIFE... THE BIG PICTURE

# GLOBAL DISRUPTION FORCES MAJOR TRANSFORMATION



# SUMMARY & CONCLUSION





## NEXT STEPS...

Once scenarios are developed, we use them to study a set of implications, which are further synthesized into strategic perspectives.

In the next stage of the Strategic Foresight process, scenarios and implications serve as a starting point to develop strategies that are future-proof, to help businesses remain relevant in any given situation that future may present.

For a PDF of this report, including the trends report that laid the foundation for this work, please click the download button below.



ONLY HAPPY IRL

IGNORANCE IS BLISS

DIGITAL BUBBLE

COCOON LIFE

SOCIAL	Bustling activity, in-person interactions.	Robust omni-channel experience supports a celebratory social atmosphere.	Virtual worlds are preferred. In-person becomes VIP.	Hyper-local gatherings of small groups with safe distancing.
TECHNOLOGY	Connected digital becomes a liability. Innovation in analog hybrids.	Rapid acceleration of technological integration into daily life.	Rapid acceleration of innovation, especially in VR and automation.	Connected, safe digital, is a VIP luxury.
ECONOMY	Economy shifts from globalization to regional and national.	Global economy slowly recovers, continuation of current trends.	Tech companies gain greater control of the global economy.	Extreme economic disruption changes the world significantly.
ECOLOGY	Disruption to energy grid and transportation force green alternatives.	Apathy towards climate change contradicts enjoyment of nature.	CO2 emissions continue to rise, people move away from urban centers.	A recovering environment is a source of positivity.
POLITICAL	East/West rift leads to a rise in nationalism.	Apathy towards politics leaves door open for a new superpower.	Political divisiveness increases at home and abroad.	Global political systems lose power, cities rise as self-ruling domains.
VALUES	Resilience in local communities keeps people positive in changing times.	Blind optimism leaves the world unprepared for disruption.	Mental health issues skyrocket, home becomes a sanctuary - or a prison.	Communities are isolated but close. Spiritual reawakening provides solace.



# SHAPING OUR FUTURE

This report explores the nature of gatherings, which could apply to a wide range of businesses. Regardless of specific context, we believe it is important for any business that wants to actively contribute to shaping the future to be cognizant of the following strategic imperatives:

1. The interconnected nature of our global society as a whole
2. Signals of change
3. Close listening to changes in consumer sentiment
4. Technology and sustainability as major forces of change

To understand more about strategic foresight and how these scenarios apply to your specific needs, please contact us at **info@sld.com**.



# APPENDIX





# TRENDS

From well-known current events to more obscure signals of change, here is our short-list for those that will have the greatest impact on large gatherings.



# TRENDS THAT WILL IMPACT LARGE GATHERINGS

The desire to connect in large groups is a universal human need. Modern society is built on the assumption that we will gather together to learn, celebrate, be entertained, socialize, protest, govern, worship and stay well. COVID-19 has temporarily challenged large gatherings, and while it is a major disruptive force today, there are other trends that will also have an impact on venues designed for large groups of people in the future.

In this section, which laid the foundation for our FUTURE OF LARGE GATHERINGS SCENARIOS, we explore trends we feel are most relevant to stadiums, theaters, malls, restaurants and any other place where large groups typically come together.



# SOCIAL TRENDS





# INCLUSION 2.0

**DESCRIPTION:** As the world becomes more diverse and informed, the act of including or being included within a group setting without discrimination is becoming widely expected. Under the umbrella of inclusion, gender neutrality, **age agnosticism**, disability (including invisible disabilities), ethnicity, religion and nationality are at the forefront of public discourse.

**CONTEXT:** A number of customer groups have been largely ignored by brands throughout history, but as awareness rises, including everyone is a must. For example, a 2017 study highlighted that a brand's position on social and political issues drives **57% of consumers' decisions** to either support or boycott it.

**IMPLICATIONS:** Brands need to think beyond accessible ramps and ads that feature diverse models. Design should reflect inclusivity beyond skin color, to include a range of ages, abilities, gender expressions and cultural backgrounds. Spaces designed for large gatherings need to offer options such as gender neutral washrooms, be fully accessible and need to ensure that staff are trained to be sensitive to inclusiveness. They must also ensure that internal culture is aligned - diverse, inclusive companies are also **more innovative** and **profitable**.

**COUNTER TREND:** “Traditional” values backlash.

**RELATED TRENDS:** Rise of youth activism.

*“...organizations with inclusive cultures were six times more likely to be innovative and agile, eight times more likely to achieve better business outcomes, and twice as likely to meet or exceed financial targets.”* **Content Marketing Institute**





# CIVIL UNREST

**DESCRIPTION:** Social, economic and political factors can all play a role in causing social unrest, which often leads to a form of protest directed towards authority. With increasing tensions between different groups around the world (racial, ideological, political etc.) brands are expected more than ever to choose a side.

**CONTEXT:** Recent events such as the murders of George Floyd and Breonna Taylor have once again brought long-standing issues to the forefront in North America and beyond. In the past decade, civil unrest has more than doubled and expectations are that **COVID-19 will only make things worse**. The upcoming US election has the potential to spark civil unrest, regardless of the outcome.

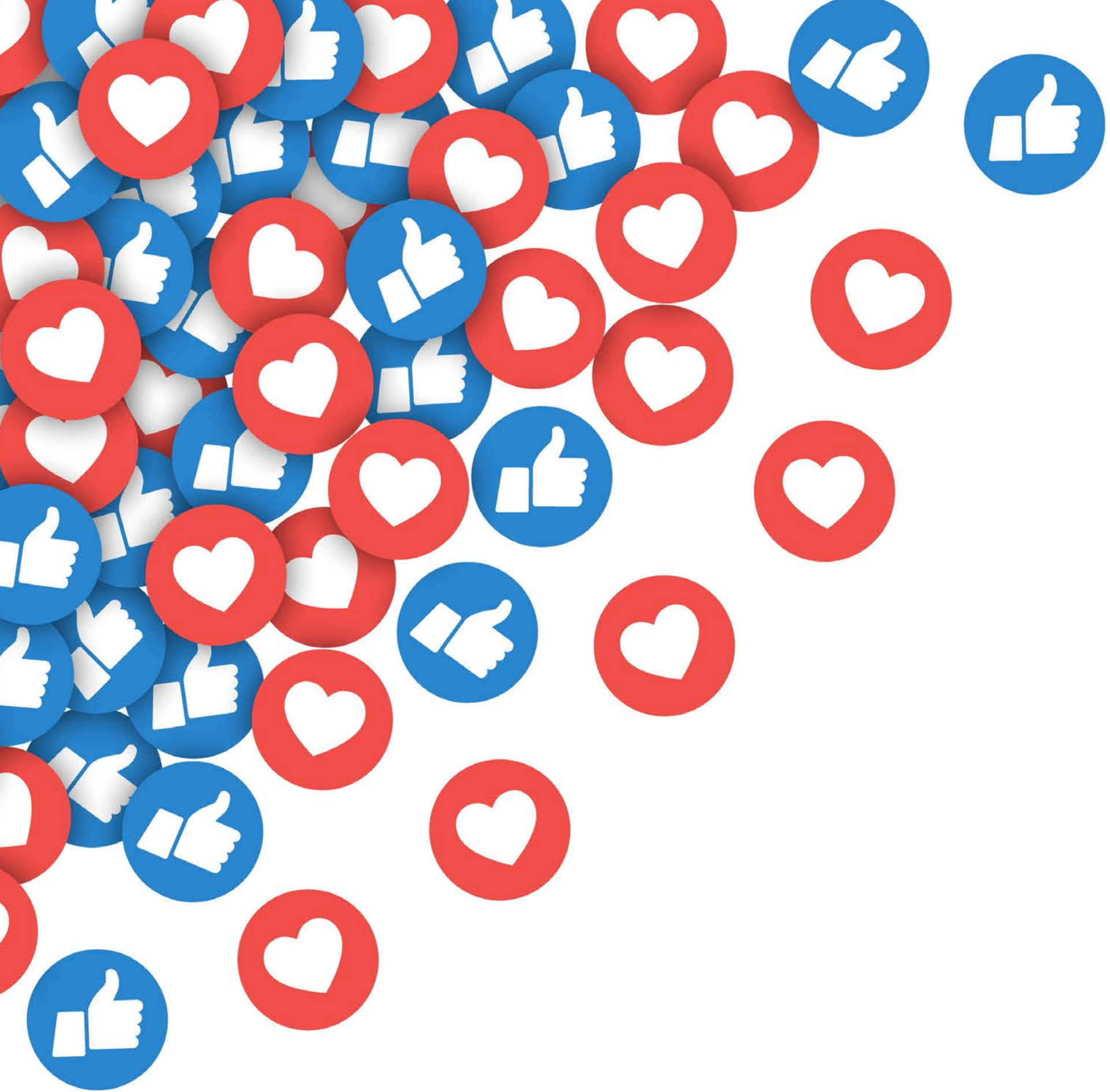
**IMPLICATIONS:** The biggest implication for large gatherings is the potential for innocent events to be co-opted, potentially erupting into violence and causing property damage and bad publicity. Brands hosting large gatherings will need to strategize to create events that will encourage a harmonious experience, to provide adequate security and to have a plan for **potential disruption**. With the pressure on brands to take a side, it will be important to be to ensure your brand's values are aligned with those of your consumers.

**COUNTER TRENDS:** **Rise of localism.**

**RELATED TRENDS:** **Widening political polarization, "cancel culture."**

*"While riots around the world increased by 282% in the last decade and general strikes were up by 821%, the index recorded violent protest in 58% of countries over the course of 2019 – a development that according to researchers 'reflects a longer-term trend'." [Euractiv](#)*





# NETWORKS OVER BRANDS

**DESCRIPTION:** Brands and marketers have long tried to get their message to consumers in a way that seems authentic and genuine. By leveraging trusted celebrities/public figures as well as past customers, brands can break down the customer vs. business relationship and make it long-lasting and mutually beneficial where a group of consumers see a particular brand as an extension of themselves.

**CONTEXT:** The **power of peer influence** is nothing new, but as the number of communication channels increase and there is more opportunity for consumers to connect with one-another, the power of friends, family and trusted influencers is at an all-time high. For example, **only 3% of consumers** consider salespeople or marketers trustworthy, while **92% of consumers** trust referrals from people they know. This gives influencers and peer reviews greater power - but as consumers become jaded by mega-influencers and sponsored posts, a shift towards **micro-niche influencers** is on the rise.

**IMPLICATIONS:** Diminished power in traditional marketing techniques will mean that in order to be successful, brands will need to rely on peer-to-peer reviews, micro-influencers and user generated content more than ever. The micro-niche trend that is prevalent for Gen Z consumers can be leveraged for local or niche events more successfully than ever, especially if it results in bringing together like-minded communities. Keeping the finger on the pulse of Gen Z will become increasingly difficult, as no one big unifier will work as it did as previous generations.

**COUNTER TREND:** **Brands as communities.**

**RELATED TRENDS:** **Micro-niche influencers.**





***“... 85% of consumers read an average of 10 reviews for a local business (91% of 18-35 year olds) before making a decision.” Monocl***





# URBAN DENSITY

**DESCRIPTION:** Prior to the pandemic, it was projected that by 2050, two out of every three people would **live in an urban center**. However, cities face multiple challenges: rising housing costs, rising sea levels and traffic congestion. **Working from home** is another factor that could impact where people choose to live.

**CONTEXT:** Population density has been steadily increasing along with the global population. For example, the population of the Toronto metropolitan area increased by **120% between 1971 and 2016**. Property value has soared and condo living has become the norm. An anti-density movement dubbed “NIMBYism” (not in my backyard) by critics, is made up of affluent homeowners who do not want to see cities become more populated. Urban planners generally agree that density is desirable, but disagree on how it should be achieved.

**IMPLICATIONS:** Fewer stores will be needed outside of cities, while the cost of real estate within cities will increase. Competition to attract customers in big cities will increase - but the desire to shop locally could impact bigger brands. If work-from-home becomes more prevalent, there could be a shift in who lives in city centers as more affluent workers leave.

**COUNTER TREND:** Cost of living, desire for nature, fear of crowds, WFH could all lead to **more people leaving metropolitan areas**.

**RELATED TRENDS:** **Housing prices.**

*“Consumers residing in densely populated areas are motivated to express their distinctiveness by reducing their preference for identity relevant brands that are common, such as large chains and brands owned by many people.” ***International Journal of Research in Marketing****



# SOCIAL TRENDS IMPLICATIONS

## SUMMARY

Greater access to information has created a more media-sensitive consumer with clear values that brands cannot ignore. In turbulent times, clear communications are reassuring and help consumers feel confident about going out.

- People want to come together - but need a lot of communication prior to events to feel safe, understand protocols, screen venues and locations as well as products and services. Digital communications including direct text messages or phone notifications will help support large gatherings.
- Messaging around health and safety measures must be clear and brands need to provide frontline workers with support to enforce regulations.
- Brands are increasingly unable to stay out of social and political issues.
- Shifting ideas about age, gender, sexual orientation, culture, ethnicity, race and immigration are moving fast, and brands must ensure they keep up.
- Big brands will need micro-niche influencers, consumer reviews and peer recommendations to support events and gatherings - if someone hears from a friend that their experience was safe and positive, it will encourage them to go out as well.
- Addressing issues like gender neutrality, sensory-sensitive disabilities and inclusivity through the built environment should become table stakes.



# TECHNOLOGY TRENDS



# TOUCHLESS WORLD

**DESCRIPTION:** The need for convenience, speed, and (more recently) hygiene has accelerated demands for **touchless technology**, allowing for human-machine interaction without physical person-to-person contact.

**CONTEXT:** Touchless technology is not a new concept, as it has been growing in the form of NFC payments and technology like Apple Face ID and Amazon Alexa voice recognition. It is projected to grow from USD 6.8 billion in 2020 to USD 15.3 billion by 2025. **It will continue to grow** as more technology advancement occurs into the future.

**IMPLICATIONS:** Businesses will need to accelerate investment into touchless technologies. For example, under government requirements, restaurants have needed to adapt **touchless menus** that can be launched by scanning a QR code with a customer's smartphone. Ticket booths may need to fully digitalize, and cashless payment will become the norm everywhere. Banks will need to rethink the ATM and pin pads. Household appliance brands will need to start thinking more about touchless faucets and toilets for residential customers. Condo owners will be reconsidering elevator and FOB technologies. Implications are widespread.

**COUNTER TREND:** **Rise of Cyber Crime**

**RELATED TRENDS:** **The Rise of IOT, Move to Cashless**

*"On its banking blog, Accenture listed "a strong push toward a cashless society" as the No. 1 potential long-term impact that the pandemic may have on global payments processes." **Forbes***



*“Our philosophy is that we want to be an ecosystem. Our philosophy is to empower others to sell, empower others to service, making sure the other people are more powerful than us. With our technology, our innovation, our partners - 10 million small business sellers - they can compete with Microsoft and IBM.”*  
*Jack Ma, CEO of Alibaba*

## DIGITAL ECOSYSTEMS

**DESCRIPTION:** By definition, a digital ecosystem is a network of interacting organizations that are digitally connected and enabled by modularity, where actions by one organization will affect the others. This can be seen in the form of giants like Amazon, Google, and Apple.

**CONTEXT:** This trend is in the midst of **strong growth** as more businesses are emerging and looking to meet the complex demands of consumers. A strong consumer-facing example of this would be Google Nest, which started as a smart thermostat, then added Fitbit integration so Nest can turn on the heat when you're awake, and then further added Mercedes-Benz GPS integration to ensure your house is warm when you step in.

**IMPLICATIONS:** Being an early mover has proven to be insufficient to ensure long-term success or leadership, therefore a strong business strategy is essential for **an effective ecosystem**. For example, IBM Watson slowly built its way to a massive network of 53 partners in three years. Additionally, BCG has found that 83% of digital ecosystems involve partners from greater than three industry sectors, and that the most successful digital ecosystems have about 40 partners. This illustrates the need to strategically diversify across industries and businesses. Large events or venues that are designed for high foot traffic by nature require an ecosystem - **to maximize profits** as margins tighten, partnering with other brands will become necessary and also improve the experience for the consumer.

**COUNTER TREND:** **Anti-Corporate Sentiment.**

**RELATED TRENDS:** **Automated/Smart Home.**



# AUTOMATION IMPACTS EVERYTHING



**DESCRIPTION:** Time-starved people looking for a higher-quality of life are turning to technologies that remove or reduce mundane day-to-day tasks. This results in more time and energy to invest in leisure and entertainment. On the business side, technology can decrease mundane tasks through automation, allowing more time and focus on service excellence.

**CONTEXT:** This trend began in the industrial revolution, which launched a slew of innovations in the form of washing machines, vacuum cleaners, and other now-common technology that is ingrained in our everyday lives. Today, emerging technology can be seen in the form of robot vacuum cleaners and a voice-activated assistants who can order groceries for you. This will only further advance into the future as machine learning and AI become more advanced and accessible to **both consumers and businesses**.

**IMPLICATIONS:** Eliminating boring tasks has challenged businesses to implement easier, more convenient technologies to engage new and existing consumers. It pushes businesses to join or develop ecosystems that are maximizing convenience. For one, this can be seen in the form of the booming food delivery market, leading to the growth of DoorDash and PostMates - which can be ordered from your Google Home. It has strong implications for service-oriented industries as well, with robots being innovated to carry out specific tasks like serving, cleaning and cooking, which could also reduce anxiety about contagion.

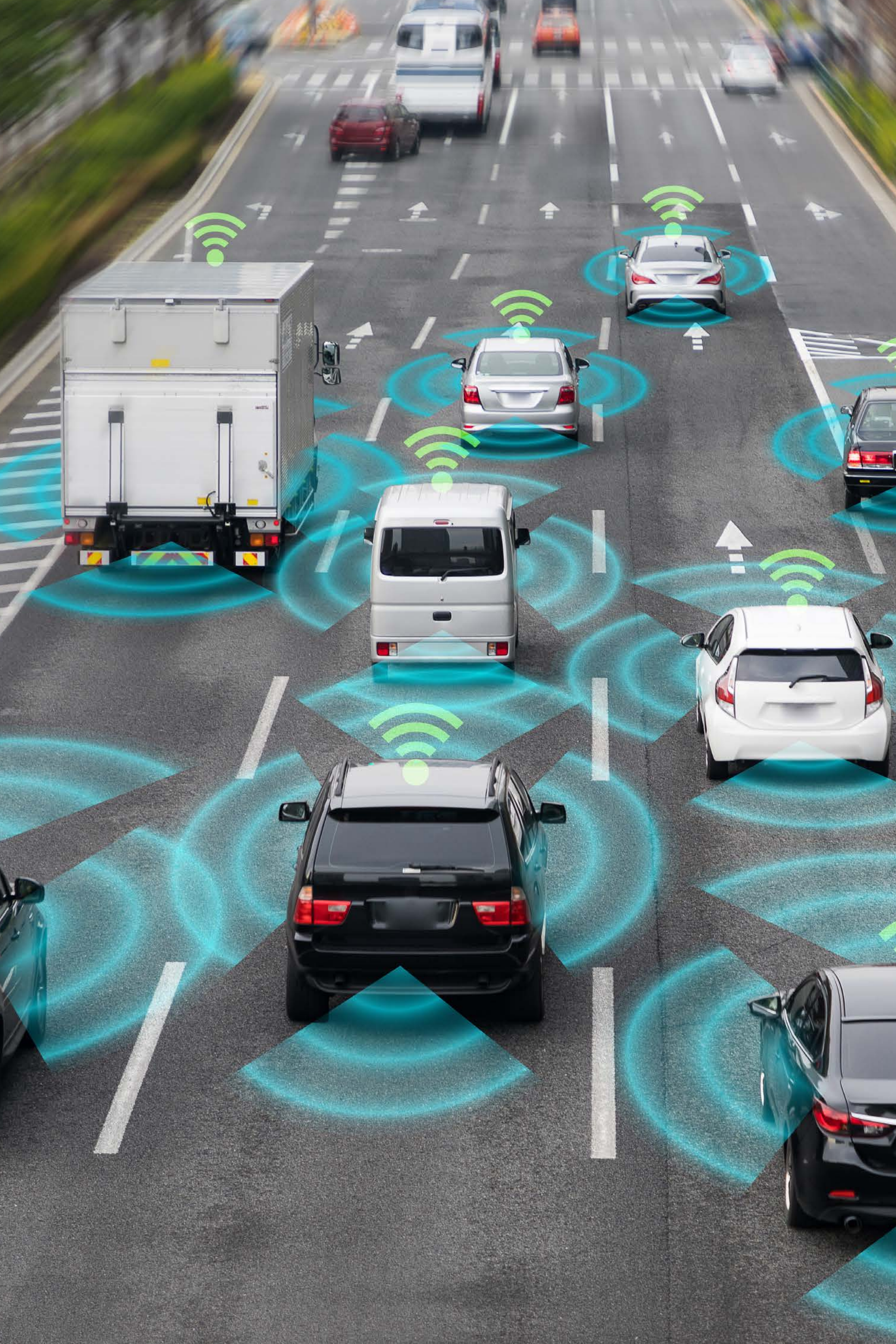
**COUNTER TREND:** **Slow living.**

**RELATED TRENDS:** Shifting job market.



***“While many people believe that routine, low-skilled jobs will fall to the machines first, the WEF paints a bleak future for many roles that were once considered safe, middle-class careers. Financial analysts, accountants, auditors, lawyers, bank tellers, statistical, finance, and insurance clerks, general managers, business services managers, administrators, and executive secretaries are all listed under ‘redundant roles’ over the next five years.” Internet of Business***





# ADVANCES IN TRANSPORTATION

**DESCRIPTION:** Technological innovations are changing the way people and things move around. From self-driving cars and delivery drones to high speed trains and space tourism, the future of transportation will influence how – and where – people get together. Environmental impact, speed, automation and safety are all at the forefront of modern transportation design.

**CONTEXT:** While 1886 is regarded as the birth year of the modern car, improvements to modes of transportation can be traced back throughout human history. Since the turn of the century, the possibilities have become futuristic, with predictions that fully autonomous cars will be on the market within the next couple of decades and private trips to space being planned for **as soon as 2021**. As people change the way they get around, where they live as well as how they shop and spend their free time will all be impacted.

**IMPLICATIONS:** There is a realistic scenario where humans no longer have to drive to the store to do errands. They could instead make their orders ahead of time online and have their autonomous car go and pick it up for them. People may also be able to live further away from where they work or shop, changing the frequency in which they go to the store or get together with friends in a public space.

**COUNTER TREND:** **Anti-automation.**

**RELATED TRENDS:** **Artificial Intelligence.**



# TECHNOLOGY TRENDS IMPLICATIONS

## SUMMARY

Technology continues to become more and more integrated into our daily lives. As tech giants gain power they also come under greater scrutiny, and as we become more reliant on technology, we also become vulnerable to gaps in security.

- Touch-free and cash-free interactions, from ticket purchases to payment to security, should be given top priority in reimagining the customer journey.
- Automation, while costly to implement, may help brands deal with a coming gap in the labour market, especially for minimum wage low-skill jobs.
- Corresponding rise in cyber-crime needs to be addressed through security measures and where relevant, analog back-up emergency systems should be explored.
- Convenience is going to continue to be a strong reason to move to digital experiences. Through COVID consumers have been willing to sacrifice some convenience to feel physically safe; however as some brands begin to address this gap, it will be imperative to keep up.
- Thinking about how automatic vehicles could change how people get to a venue is wise - although it is hard to predict when exactly this technology will be widely deployed, an over-reliance on car ownership may become problematic within a few years.



# ECONOMIC TRENDS



# INCREASING INCOME DISPARITY

**DESCRIPTION:** Many factors, including gender, race, education level, place of birth, age bracket and the rise of automation are all playing a role in the widening gap between the world's wealthiest and poorest. As income disparity increases, it will continue to impact what essential and non-essential products and services the majority of the world's population is able to afford.

**CONTEXT:** Income disparity has been steadily increasing over the past century, but the pace has picked up even more over the past 50 years. For example, the wealth gap between America's richest and poorest families **more than doubled** between 1989 and 2016, while the average income in North America is **16 times higher** than that of Sub-Saharan Africa.

**IMPLICATIONS:** With a significant portion of the world's population having less disposable income, economic growth, crime, health, and housing are some examples of things that will be impacted. For brands, income disparity will also change the idea of what "value" and "luxury" mean and will alter how people make their purchase decisions. For those consumers that do have greater financial flexibility, unique and exclusive experiences will become more popular, meaning brands will need to find a way to cater to the differing wants and needs of their customers.

**COUNTER TREND:** Universal basic income.

**RELATED TRENDS:** Social unrest.



# GLOBAL RECESSION LEADING TO VALUE FOCUS

*“Assuming the pandemic fades in the second half of 2020 and that policy actions taken around the world are effective... we project global growth in 2021 to rebound to 5.8 percent. The cumulative loss to global GDP over 2020 and 2021 from the pandemic crisis could be around 9 trillion dollars, greater than the economies of Japan and Germany, combined.” IMF*

**DESCRIPTION:** With the globe being plunged into a serious recession, the move towards value that was already underway as a result of the rising cost of living will accelerate. Private labels have already gained consumer confidence and brands that deliver greater value are poised for success.

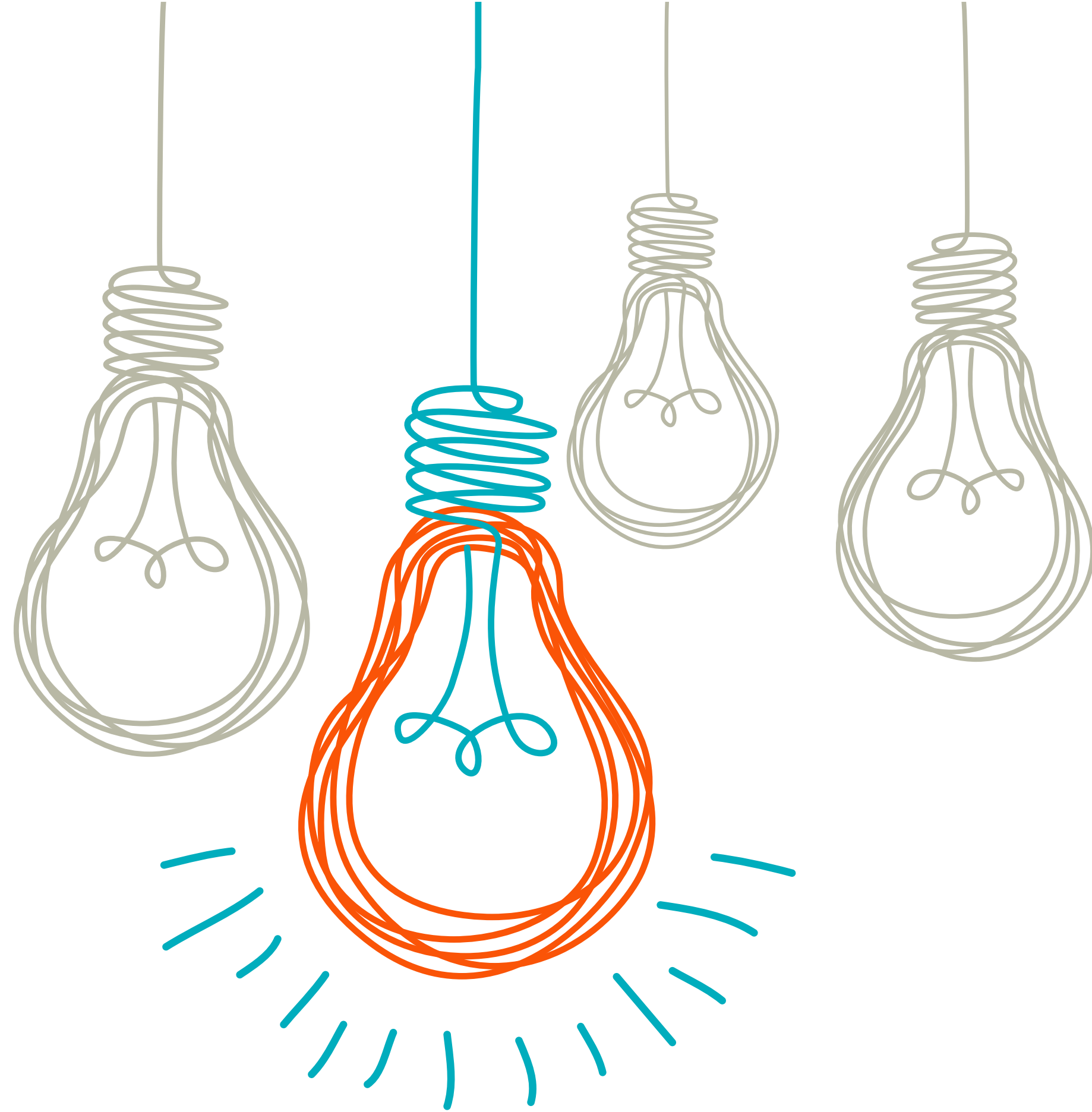
**CONTEXT:** With the economic impact of COVID-19 only just beginning, families have less money to spend and may have even less in the future. Government support programs are dwindling, while in the US specifically, numbers of cases are high and business disruption continues. In many parts of the world, regional outbreaks have forced new or partial quarantine lock-downs. Many companies have laid people off, some businesses are closing permanently and others are shifting their models radically to try and stay afloat. Brands with a value-based position will be somewhat sheltered as economic hard times force people to rethink spending.

**IMPLICATIONS:** The cost of tickets for large-scale events such as professional sporting events or concerts may become unaffordable, making it hard for companies to fill seats. Low attendance will force entertainment venues to rethink their business model in order to appeal to **value driven consumers**. Expect large corporations to help provide greater access to events by the value driven consumer. Smaller venues will likely struggle but may be able to leverage “local” as a key point of difference.

**COUNTER TREND:** Experiential Economy.

**RELATED TRENDS:** Growth of subscription offerings.





# NEW BUSINESS MODELS FUEL INNOVATION

**DESCRIPTION:** New hybrid business models enable entrepreneurs to maintain control and leverage the power of the market. This gives rise to indie brands who are disrupting well established and mature brands. Along with this, the commoditization of the market and COVID-19 creating an industry reset means that brands will be forced to **rethink their business models**, leading to greater innovation.

**CONTEXT:** Disruption is not new, but in any crisis of significant magnitude, it intensifies. Gains in productivity and the ability to charge more are being severely diminished in the current climate. The pandemic will likely make this a dominant trend, which will continue to see the demise of many established retail brands.

**IMPLICATIONS:** Sports and entertainment venues will need to rethink their business model on how they deliver unique experiences to their customers. With live sports representing the only content that generates significant advertising revenues, companies will be forced to rethink how they can derive greater value from each event. Multi-purpose bundling, unique and different **use of space** and different content formats are all on the table. **Leadership** will need to shift towards design and innovation.

**COUNTER TRENDS:** Mergers and Acquisitions.

**RELATED TRENDS:** Crowd sourced ideas.

*“Developing a novel, innovative business model that is capable of rising to future challenges in an uncertain and connected high digital density environment requires the talent of an entrepreneur. This means the executive of the future must be good at design and strategically shrewd, and also a talented venturer.” **BBVA***



# ECONOMY TRENDS IMPLICATIONS

## SUMMARY

Even if a vaccine or treatment for COVID-19 appears tomorrow, it will be 12 - 18 months before it is widely distributed, or even longer. Given that the best case scenario involves at least another year and a half of COVID related disruption, strategies to dynamically shift the business model are likely necessary to keep large gathering-dependent businesses afloat. The good news is that innovative brands may have a breakthrough moment if they can address not only COVID, but other disruptive trends and forces that are looming ahead.

- Convenience and experience have not disappeared - although health and safety are now higher on the priority list, places that make it easy and convenient for people to have a safe and memorable social experience will succeed.
- A dynamic shift from a one-size-fits all experience to a VIP experience and/or a value experience.
- Venues that rely on people in seats for revenue will need to dramatically rethink their model. Rethinking how content could support live events will be critical, as well as partnerships and ecosystems that can create new revenue streams and maximize optimal space.
- Large spaces may be able to fill in gaps for families (childcare, education), health and fitness, spirituality, communities.



# ECOLOGICAL TRENDS



# EXTREME WEATHER

**DESCRIPTION:** Linked to climate change and human activity, there has been an increase in the frequency and severity of **extreme weather events** around the world. Houses, stores and whole cities are vulnerable to the destruction that these storms can cause.

**CONTEXT:** Over recent decades, extreme weather and climate events have increased drastically. These have included droughts, heavy downpours, floods, wildfires, hurricanes, tornados and winter storms. For example, the number of floods and other hydrological events have quadrupled globally since 1980 and have **doubled since 2004**.

**IMPLICATIONS:** Property damage and loss of inventory could significantly impact brands, especially those with large, valuable retail assets such as theaters, stadiums and halls. Insurance premiums may skyrocket and in some cases, insurance for certain events may no longer be available: for example, in some areas of **Florida, flood insurance** is becoming increasingly difficult to obtain. Semi-permanent or mobile structures, or structures built to withstand specific regional weather events will become more important.

**COUNTER TREND:** Climate change denial.

**RELATED TRENDS:** Rising sea levels.

*“Asian businesses, in particular, will feel the impact of extreme weather conditions. In 2018, the region lost \$54.7 billion to natural disasters, according to the same report. That year, economic losses in North America totalled \$80.5 billion.” **CNBC***



*“Consumer spending on oil is expected to plummet by more than US\$1 trillion in 2020, which would mean there would be a historic switch this year in which electricity will become the largest single element of consumer spending on energy.” Oil Price*

## GREEN ENERGY

**DESCRIPTION:** Green energy sources that do not contribute to climate change are becoming more widely **in demand**. Collected from renewable sources (sun, wind, tides, rain, waves and geothermal heat), green energy is being rapidly integrated into public energy systems and in many cases, incorporated into the infrastructure of individual buildings.

**CONTEXT:** The shift to green energy has political ramifications, with the oil industry resisting its imminent decline. However, it has widespread public support globally. In spite of President Trump’s attempt to revive coal, **77% of Americans** say green energy is more important than fossil fuel. China has been a leader in green energy; however, they have run into some roadblocks that are slowing the positive effects: for example, solar energy production has **dropped to 15%** due to air pollution blocking sunlight from solar panels.

**IMPLICATIONS:** The use of green energy will increase - but the overall energy use may also increase. The financial and PR cost of dirty energy will rise, making it imperative that brands with retail assets consider how to shift to **greener building design**, including energy that is potentially generated on-site through solar panels or heat pumps, for example. Lighting, air conditioning and use of large digital screens could become taboo in a way that older cars became labelled “gas guzzlers” if they are not powered by clean energy sources.

**COUNTER TREND:** Oil lobby.

**RELATED TRENDS:** Circular economy.





# ECO-AWARENESS

**DESCRIPTION:** The general public, and especially younger generations, are increasingly aware of climate change and pollution. The degree of knowledge about what products and services are truly eco-friendly is at an all-time high, and the value placed on green options is at a premium.

**CONTEXT:** In 2019, a **series of youth protests** around the globe, ignited by Gen Z climate activist Greta Thunberg, saw millions of young people take to the streets demanding action from governments. Concern for the environment can cause “**eco-anxiety**” which the American Psychological Association defines as “a chronic fear of environmental doom.” Scientists are sounding the alarm about many catastrophic events, such as a mass extinction, food insecurity, sinking cities and ocean acidification. Political efforts to combat climate change, such as the **Paris Agreement**, have become political bargaining chips, leaving younger generations to feel abandoned by leadership.

**IMPLICATIONS:** As the impact of climate change and pollution increases, anxiety will also increase. Politicians have not stepped up - which leaves a huge opportunity for brands to lead where governments have failed. Gatherings will be impacted as consumers will value **spaces that are eco-friendly** and will prioritize visiting such venues. On a bigger scale, brands must take a leadership position not only in one facet of their model, but throughout. Young consumers will **reward truly eco-friendly brands** - and will punish those who greenwash or fail to address this issue, which is the biggest concern of their generation.

**COUNTER TREND:** Climate change denial.

**RELATED TRENDS:** Minimalist living.



***“82 percent of Gen Z students are more likely to buy a product if it’s environmentally friendly. And a separate study from Nielsen showed that 77% of Gen Zs are willing to pay more for those same environmentally friendly products, vs. just 51% of Baby Boomers and 66% of the overall population.”***

***Gen Z Insights***



# ECOLOGY TRENDS IMPLICATIONS

## SUMMARY

While disruption from climate change is already occurring around the globe, in North America we are only beginning to feel the effects. However, younger generations are acutely aware of the impact of climate change and will not likely shift from that position. In spite of the current intense focus on COVID, brands must not be distracted from shifts to greener ways of conducting business.

- Temporary indoor/outdoor uses of space can create opportunities to overcome COVID related disruption. Parking lots, roof terraces, balconies as well as open air stadiums can maximize use through bundled high-value experiences.
- Retail assets will need to be reviewed in terms of their resilience to climate change and extreme weather. The East Coast and Gulf are susceptible to flooding and more intense hurricanes, while California is facing a threat from increasing wildfires, for example.
- Climate change will bring about enormous shifts in urban landscapes. Brands should assess now which cities are likely to experience internal population displacement in the next 50 years and develop a retail asset strategy to address these changes.
- Spaces that are creative in their use of closed loops and green energy will become strongly preferred. Energy guzzlers run the risk of being seen as tacky, outdated and even offensive.



# POLITICAL TRENDS





# ANTI-VAX/ANTI-MASKERS

**DESCRIPTION:** Anti-vaxxers, who believe vaccination is dangerous, have increasingly made an impact on vaccination rates, resulting in outbreaks of previously eradicated diseases. Anti-maskers, who believe mask-wearing is an infringement on personal freedom, have adopted similar tactics and language to spread misinformation about mask wearing.

**CONTEXT:** Anti-vaxxers have been around as long as vaccines, and range from libertarians to “wellness” advocates. Anti-maskers are primarily concerned with personal freedom and suggest that mask-wearing is **unpatriotic, emasculating and communist**. Both groups are mistrustful of media, science/modern medicine and government. Many believe in other conspiracy theories, for example that COVID-19 is being spread through 5G networks. Both groups are resistant to any enforcement of medical treatment. In the US specifically, “**personal freedom**” is venerated to an extreme, trumping the greater good. Anti-maskers also take their cues from Donald Trump, who has been consistently resistant to mask-wearing.

**IMPLICATIONS:** Currently, there is a need to increase security to ensure the safety of staff and patrons in enforcing mask-wearing regulations. Once a vaccine is available, the anti-mask and anti-vax movements will likely come together to disrupt vaccination efforts. Brands hosting large gatherings may have to determine policies regarding staff vaccination - and to prepare for backlash as well as support.

**COUNTER TRENDS:** **Enforced mask-wearing legislation. “Covidiot” shaming.**

**RELATED TRENDS:** **COVID conspiracy theories.**



*“Sen. Mitt Romney (R-Utah), who decried public assistance benefits as a presidential candidate in 2012 but tweeted in March, as the pandemic was gaining steam, that ‘every American adult should immediately receive a one-time check for \$1,000.’” LA Times*

# UNIVERSAL BASIC INCOME

**DESCRIPTION:** Universal Basic Income is an economic model that ensures a minimum income to all citizens, regardless of their employment status.

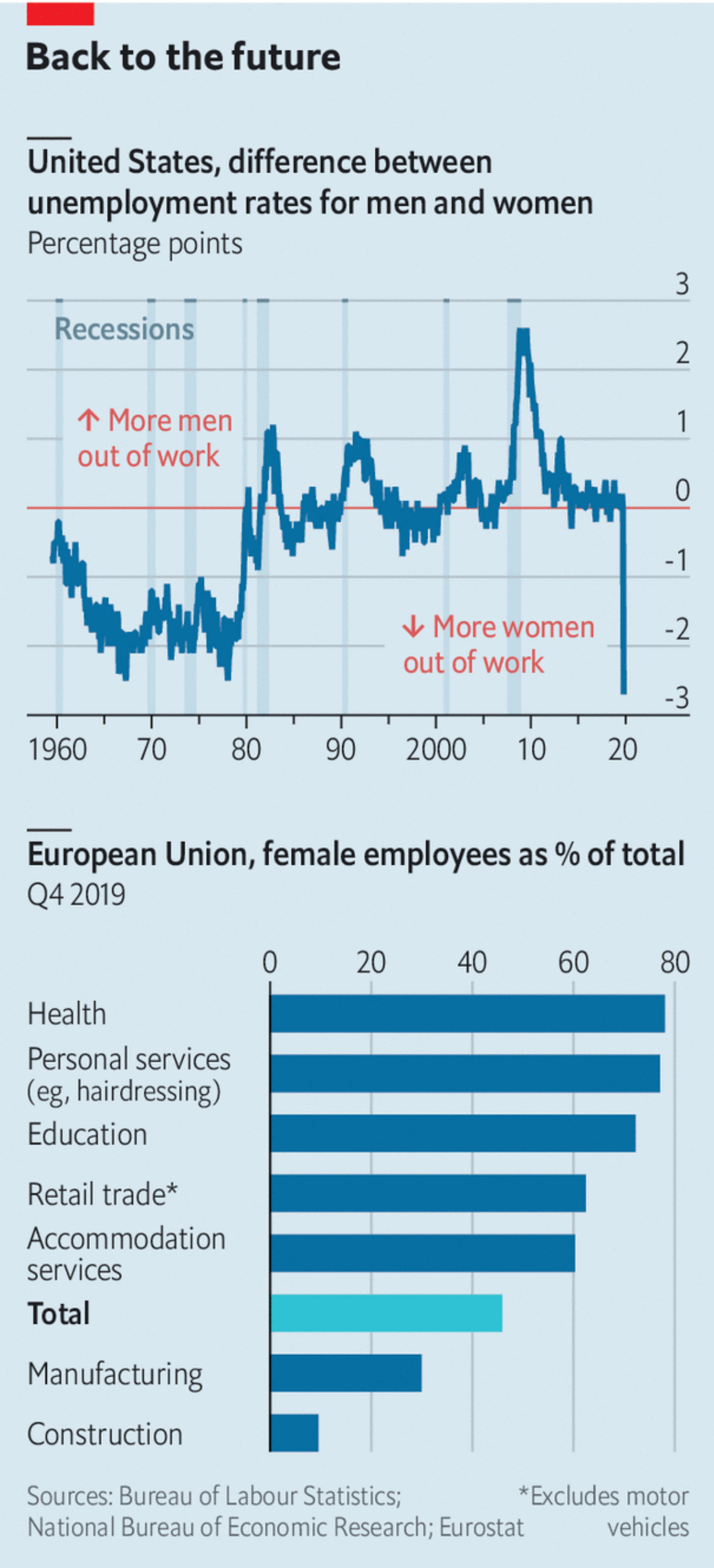
**CONTEXT:** Since the 1980’s inflation has sky-rocketed while wages have stagnated. Housing insecurity is on the rise, and in most places, minimum wage is not sufficient to support basic necessities. The threat of job losses due to automation have so far been the strongest argument for UBI, most notably advocated by **businessman Andrew Yang**. Sir Richard Branson and Elon Musk also predict UBI will become inevitable as a result of automation. However, the pandemic has forced governments to create emergency support payments to those who lost their jobs. As the economic impact of COVID continues, the conversation about UBI may be forced into the mainstream and could gain more widespread support more quickly than expected.

**IMPLICATIONS:** If UBI became a reality, minimum wage jobs could become less attractive. UBI enables people to pursue higher education and careers in not-for-profit and the arts at higher numbers. It would give more power to workers and theoretically reduce inequality. Brands would have to shift business models to address the need for better compensation, while small businesses could be disproportionately impacted by the **job market shift**.

**COUNTER TREND:** **Anti-socialism.**

**RELATED TRENDS:** **Automation.**





# INCREASED GENDER INEQUALITY

**DESCRIPTION:** Women have been negatively economically impacted at a higher rate than men as a result of COVID-19. Women are more likely to lose their jobs, be saddled with extra childcare and may find it more difficult to find another job.

**CONTEXT:** Women have made strides in the past 50 years when it comes to gender equality. However, backsliding on women’s reproductive rights began before COVID, signalling a threat to those gains. The **pandemic’s impact on gender inequality** has been swift. Women were more likely to lose jobs and those with children were more likely to take on additional childcare. Many mothers have reduced work hours or even left jobs to care for children. As school reopening is widely varying from one location to another, the need for parents to manage children will continue to be a burden on women. Long gaps in employment are a key factor in gender inequality.

**IMPLICATIONS:** If women are unable to find childcare or work, there may be widespread and **long term social and economic impact**. This could indicate family spaces and child care spaces will become more valuable. There may be a need for businesses to subsidize childcare for workers, provide flexible options or even to provide childcare in-house. Female customers, particularly those with children, are likely to become more financially conservative in the foreseeable future.

**COUNTER TRENDS:** **Universal Basic Income.**  
**RELATED TRENDS:** **Work from home. Declining birthrate.**



# ASIAN INFLUENCE RISING

**DESCRIPTION:** As China and India's economies grow, their political power and cultural influence attain a greater reach. As this dynamic develops, both conflict and collaboration are unfolding in politics, business and culture.

**CONTEXT:** China's rise as a new world power has provoked fear in the west, especially in the US. **Trade wars** and concerns about surveillance have resulted in conflicts such as the arrest and extradition hearings of Huawei CFO Meng Wanzhou. But China is not the only Eastern power making a play for a greater part on the world stage. **Russian interference** with foreign elections is widespread, for example. K-pop fans disrupted a Trump rally by purchasing tickets from fake accounts - Trump responded by banning TikTok, prompting a pending forced sale of the app to Microsoft. Japan, Vietnam and Singapore provide a view into how an eastern collective approach can have economic value by **curbing the pandemic**, without resorting to such heavy-handed measures as seen in China. India, likely to surpass China in population by 2027, is consistently moving up the global ranks for innovation.

**IMPLICATIONS:** Political antagonism, especially trade wars, has an obvious impact on business supply chains. But a greater implication for gatherings is in regards to attitudes about **5G and surveillance**, which are increasingly becoming topics of paranoia, potentially signalling a challenge for brands when it comes to security measures and digital engagement. What consumers like (TikTok) may clash with political agendas.

**COUNTER TRENDS:** **Local pride.**

**RELATED TRENDS:** **Cyber warfare and espionage.**





***“In a gender-regressive scenario... we estimate that global GDP growth could be \$1 trillion lower in 2030 than it would be if women’s unemployment simply tracked that of men in each sector. Conversely, taking action now to advance gender equality could be valuable, adding \$13 trillion to global GDP in 2030 compared with the gender-regressive scenario.” [McKinsey](#)***



# POLITICAL TRENDS IMPLICATIONS

## SUMMARY

Even an optimistic scenario includes a more divided future. Globally, east/west relations are unlikely to become cozy. In North America, a sharp left/right divide is unlikely to be overcome regardless of who is in the White House. Here are key implications for large gatherings.

- Event plans will have to take into consideration additional security to address COVID regulations, potential civil unrest.
- A preference for local artists, local teams, local food, local fashion will become a moral imperative. Travel and trade barriers will force a greater focus on local, as it will be easier to source and more appealing to consumers.
- Automation may become a hotly debated political issue.
- Large spaces may be able to fill in gaps for families (childcare, education), health and fitness, spirituality, communities.
- Relations with China may strain supply chains, while a drop in global tourism may also impact sales projections.
- Gender inequities as a result of COVID should be addressed through company policies.



# VALUES TRENDS



## THE BUYERARCHY of NEEDS (with apologies to Maslow)



# CONSCIOUS CONSUMPTION

**DESCRIPTION:** Consumers are becoming more mindful in what they buy as they seek to combat some of the negative effects consumerism is having on the world. This trend is driving behaviors across many fronts, from flexitarianism to ethically sourced products and demanding brands become more accountable for their actions.

**CONTEXT:** It was labelled as a key trend shaping **market dynamics in 2019**. With the pandemic it has morphed into a bigger trend encompassing other related trends like equality, individual rights to privacy, social-stewardship, etc. Purchase decisions are being weighed more carefully, with people turning to do-it-yourself, **renting**, second-hand, purchasing local, **supporting Black-owned businesses** and repurposing goods becoming commonplace. Barter, “curb alerts” and community sharing systems such as **the mini pantry movement** are also becoming more mainstream.

**IMPLICATIONS:** Consumers want to engage with brands that share similar values. They are more vocal about their choices and are capable of influencing others to follow suit via social networks. Gathering for a purpose, uniting behind community initiatives and offering alternatives to the sale of cheap, ubiquitous merchandise will be more in line with customers’ preference for large gatherings and experiences. Maker spaces, classes and micro-manufacturing are all important things for venues to consider.

**COUNTER TREND:** **Recession driving purchases towards cheaper alternatives.**

**RELATED TRENDS:** **Supporting Black owned businesses.**





# PERSONAL SAFETY BIAS

**DESCRIPTION:** Cognitive bias and personal beliefs have been known to play an essential role in understanding the response of people towards handling personal safety. Self-identity and implicit assumptions can dilute the actual risk that individuals feel and in turn dictate their reaction.

**CONTEXT:** As we have seen, there are many people who strictly follow the rules for reducing direct public health risks associated to their health and the health of others. But the **personal safety bias** plays out specifically when examining those who don't see direct health risks and for various reasons, refuse to follow the rules. Therefore we see a split between these groups as a direct outcome of their emotional and intuitive beliefs.

**IMPLICATIONS:** Many pictures have emerged throughout the pandemic of beaches and parks filled with people even when the risk of community spread is still a concern. Psychologists have labelled this behaviour as reactance bias, where individuals fear that **rules and restrictions** are placed on them to restrict their freedom. Their behavior could derail efforts invested in controlling the pandemic. Hosts of large gatherings will have to assume some responsibility in enforcing rules for the greater good.

**COUNTER TREND:** **Pandemic fatigue.**

**RELATED TRENDS:** **Companies manufacturing PPE.**

*"The more people an individual interacts with at a gathering and the longer that interaction lasts, the higher the potential risk of becoming infected with COVID-19 and COVID-19 spreading." [Center for Disease Control](#)*



# WELLNESS MINDSET

**DESCRIPTION:** As a reaction to an overly-stimulated, tech-saturated world, wellness and a focus on mental health is now a part of a much larger trend of mindful living. What was once the domain of religion, mindfulness and wellness **has become mainstream**.

**CONTEXT:** Yoga and meditation have been around for thousands of years, but it has only been since the 1990's that it has become accepted as part of mainstream culture. Coinciding with a decline in identification with organized religion, spiritual seekers are **looking for alternatives**. Apps for guided meditations, online spirituality classes and exercise classes that focus on mind-body connection have all skyrocketed in popularity. Many companies are embracing counter-intuitive practices to support wellness, such as 4-day work weeks, and have found they actually increase productivity. Examples like this challenge traditional notions of working hard and staying busy as a way to be a productive, healthy person, and places emphasis on a more wholistic approach to life.

**IMPLICATIONS:** Having a meaningful reason to come together is increasingly important to consumers, especially with COVID-related stress changing daily life and adding another anxiety to the list. Whether it is linked to social justice, wellness or fitness, consumers are seeking ways to live well. Traditional gyms may find the pandemic challenging, so large open spaces (**especially outdoor / partially exposed spaces**) that could be leveraged for fitness-related activities in a safer way may offer partnership opportunities. **Luxury wellness** is a rising trend that also offers opportunities.

**COUNTER TREND:** **Tech addiction.**

**RELATED TREND:** **Health and Fitness Online.**







# VIRTUAL COMPANIONSHIP

**DESCRIPTION:** Virtual companionship can include software or hardware designed with an intention to give emotional assistance or companionship to an individual. It can serve as a mode for entertainment or perform a functional caregiving role.

**CONTEXT:** The role of virtual companionship is evolving. It began with virtual pets but is now becoming more advanced with the introduction of holograms and storytelling via gaming platforms. Virtual companions have proven their utility in **helping the elderly** cope with depression and loneliness. Application of AI has evolved from basic chatbots to realistic companions with emotional responses through intelligent conversations. One such example in a social group setting is that of **AI-assisted online social therapy groups**.

**IMPLICATIONS:** As we are more and more accustomed to interacting through virtual means and the pandemic limits our ability to meet in real life, the ability to create virtual environments where people can interact socially is becoming more relevant. Virtual concerts, virtual showrooms and virtual conferences are suddenly all the rage and while they are currently seen as a replacement for “the real thing” it is probable that engaging with not only other people online but with AI-enabled avatars will become more common and accepted.

**COUNTER TREND:** **AI Skepticism.**

**RELATED TREND:** **Alexa, Google Assistant and Siri.**



# VALUES TRENDS IMPLICATIONS

## SUMMARY

There are those who want to see the world transformed by the pandemic and those who want to go “back to normal.” If anything, the pandemic will push us more towards values we were already embracing.

- Convenience and experience have not disappeared - although health and safety are now higher on the priority list, places that make it easy and convenient for people to have a safe and memorable social experience will succeed.
- Large spaces may be able to fill in gaps for families (childcare, education), health and fitness, spirituality, communities.
- Conflict between an “us and them” mentality and a “stronger together” mentality will persist and challenge brands to find a set of values that is meaningful to their target demographic and then demonstrating that it is more than just a PR move.
- Mindful living is a mainstream idea that brands need to embrace in everything from product development and mix to the environment and experience. This is an emerging need that is intensifying.
- Fears that online relationships and experiences are inferior to IRL relationships are being challenged by virtual events... in some cases, a virtual event may allow more people to participate, for example. Virtual reality and augmented reality are areas for brands to continue exploring as online no longer has to mean impersonal.





# CRITICAL UNCERTAINTIES

These factors have unknown outcomes that may influence trends in a specific direction.





# SOCIAL

- Will civil unrest around Black Lives Matter result in widespread systemic change? Or will civil unrest intensify? Could this lead to civil war?
- Will “traditional” values begin to rise in backlash to liberal ideals? How could this impact the decision brands make when “taking sides?”
- Will traditional marketing be replaced entirely by peer-to-peer marketing? If so, will consumers become similarly jaded towards peer-to-peer?
- Will a trend towards reductionism fit with our current economic model?
- Will a less binary view of gender become the norm?
- Will working from home become the new normal? Or will we return to a hybrid model? Back to the office? What other COVID related changes in behavior will become permanent or lead to a permanent change in how people live and meet?
- Will more people decide to leave cities and large metropolitan areas, instead opting for personal space and cheaper cost of living?
- Will hyper-personalization shopping experiences lead to a desire for more personal discoveries?



# TECHNOLOGY



- Will a rise in cyber crime disrupt people's use of technology in a significant way? Or will tech companies be able to keep pace with counter-security measures? What impact, if any, will that have on the cost to deliver digital services?
- Will the internet become segregated by borders or other imposed firewalls?
- Will governments be able to keep pace with technological innovations and impose the necessary legislation?
- Will personal privacy become increasingly important or will consumers no longer hold this as an expectation? Will consumers accept widespread surveillance or will they begin to oppose measures such as facial recognition?
- When will automatic vehicles be ready for widespread production and will they disrupt public transportation? How will they impact car ownership? Will "the loop" replace air and ground transport of goods? Will it replace domestic air travel? What implications could this have?
- Will technology be widely disrupted by something beyond human control, such as solar flares?
- Can bio-tech prevent future pandemics?
- Will we become accustomed to spending more time in a virtual world than the physical world?



# ECONOMY

- How quickly will the global economy recover from the pandemic? Will the recovery return to a similar economic model, or will it be forced to change permanently? If so, how will it change?
- Is conscious capitalism possible?
- How will income disparity impact growth?
- Will Universal Basic Income become necessary? If so, which countries will adopt it first and how will it potentially change the economic model?
- How will trade wars and east/west relations impact the global economy?
- Will new countries emerge as economic powers? How will this impact global relations and influence?
- Will future pandemics, natural disasters or social unrest have a lasting impact on economies?
- How will an aging population and declining birth rate affect global workforces?



# ECOLOGY

- When will the impact of climate change create widespread upheaval in North America? Will we feel the physical impact or the economic impact first?
- When will we stop using oil? Will our energy usage continue to grow? Will we be able to meet demand through green energy? Will we be forced to reduce energy usage?
- When will food insecurity become politicized in mainstream North America?
- Will world governments rally in time to slow the rise of global temperatures and avoid a worst-case scenario?
- Can geo-engineering reverse climate change? Will some countries go rogue with geo-engineering experiments?
- Will water scarcity be recognized as an economic and human rights crisis?
- Will technological innovations such as 5G have a noticeable environmental impact?
- How will a rise in air pollution impact the health of humans?
- Will sustainable urban development become more widely accepted?
- How will waste management issues impact what can and can't be produced/purchased?



# POLITICAL



- Who will become the next world superpower? Will China achieve that goal independently? Will Russia and China become allies? Will a western coalition prevent China's rise?
- Will tech companies have a greater role in global governance? Will international governments unite to control the power of tech giants?
- Will there be a cyber war? If so, who will be fighting, why, and what will be the outcome?
- Once a COVID vaccine is available, how will we get the world vaccinated? Will anti-vaxxers be able to significantly disrupt vaccination efforts? Will first-to-develop nations share their vaccine or will the vaccine become weaponized?
- Will socialism rise? If so, will it look like a social democracy such as 1970's Canada or will a new form of socialism emerge?
- If distrust of media deepens, how will people find out about what is happening in the world?
- Will calls for gender and racial parity in politics lead to change? If so, how will this impact government policies?
- Will political divides increase the prominence of extremist and hate groups? Will there be a rise in terrorism?



# VALUES



- Will traditional religion continue to be relevant, or will a new version of spirituality dominate the future of religion? Could physical fitness, wellness, mindfulness fill this space? If not, what will?
- Will we embrace mental health as a moral imperative and address work/life balance? Will automation allow us to live more balanced lives?
- Why will we want to come together in the future? What will be meaningful to us? Will professional sports cease to be relevant? Will mega-pop stars still exist?
- Will “stuff” become a sign of moral decrepitude? Will we judge each other based on other “status symbols” and what will they be?
- Will our relationships with others online be a net positive or a net negative? Will social media platforms find a successful balance between freedom of speech and censorship? If a net positive, how will we evolve our online social world? If a net negative, how will social media networks have to change?
- How will the education system be impacted in a post-pandemic world? Will home-schooling become more prominent? Will less value be placed on in-person learning? Will more people elect not to go to university or post-secondary institutions, either due to safety or financial concerns?
- Will social credit systems, similar to what is being seen in China, become commonplace in other parts of the world?



# CONTRIBUTORS

SLD's Strategy & Communications team worked together to manage this process and create this report. Part of our process also involved designers from our team and a group of industry professionals who provided perspective and insights through written recommendations as well as a two hour workshop.

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**THANK YOU**