

Anticipating the post-Covid 19 world:
implications for lifestyles

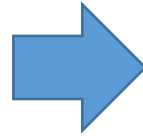
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MARKET ANALYSIS

Disruption of C19 thru triple shock of sanitary emergence

economic shutdown &
social isolation/physical distancing



major shift in how practices,
routines, lifestyles are enacted



what effects?

what *trends*? accelerating, decelerating, surprises
which *scenarios*? old normal vs new normal

Type of *trends* in specific areas

Accelerating → digitalization of work, leisure, education, love, healthcare, shopping

→ gamification of social life, wellbeing, leisure, education

→ work-life balance / environmental awareness / community-oriented needs&wants

Decelerating → sharing/f2f collaboration ↔ return of individualism

→ experience-based hedonism

→ anti-throwaway/anti-disposal etiquette

Surprises → reification of wellbeing/health as cleanliness

→ every business is a health business

→ social cocooning

→ radical halt in consumerism & material status-signalling

→ return of state authority and welfare state

Scenarios

Old normal vs New normal

Google entries*:

-Back to normal: 82,3 mill

-New normal: 88,8 mill

-Old normal: 0,8 mill

*as of June 4, 2020

Survey opinion reactions:

Majority still wary/fearful or consciously opposed to engage in business as usual

Observable and economic data

Empty malls ↔ Full beaches & parks

Our approach

1) Trend scoping by **domains of practice** based on both *individual-level data (surveys)* and *aggregate/macro-level (practices)*

1. Work
2. Family/parenthood/love
3. Social life
4. Education
5. Leisure
6. Wellness/personal health
7. Housing/living habitats
8. Mobility
9. Consumption (cycle acquisition-use-disposal,
food provision/choices, means/modes)
10. Financial security/social equality/material wellbeing
11. Citizenship
12. Healthcare provision

Mapping out individual and societal effects generating positive and negative implications for a sustainability project

Trend scoping by **domains of practice** based on both *individual-level data (surveys)* and *aggregate/macro-level (practices)*

6. Wellness/personal health

Mapping effects with sustainability implications

Individual effects

Main expression

+

-

Quarantine leaves room/
time for **individual-centric
wellbeing/growth +
community involvement**

Yet, financial hardship &
hygiene train seriously
**restrains spending &
attention on self-care**
(beyond disinfection/anti-
bacterial mindset)

Expectations for more time spent on
**spiritual activities and solidarity
engagements**

Abrupt halt of previous habits match
**calls to rethink lifestyles towards
work/life balance, simplicity,
dematerialization** of wants/desires

Physical and mental health narratives
get to the top of the agenda, along with
home streams of Yoga, Zumba, etc

Fitness/wellness concerns may be **more
aspirational than behavioral**:

in BR, searches for fitness tools up + 160%,
yet surveys show **people exercising less than
before (a net -15% people doing exercises, with
35% self-reporting as under-exercising, McKinsey;
Ipsos)**

Live yoga classes experiencing a downturn over
weeks of lockdown

*BR: weekly downloads of fitness apps moved from 1.2m to 4.4m
over first 60 days of C19 (VEJA Rio, 11/05/20)*

*Followship of online yoga/meditation youtubers up 800% to
1.2m access/month (CBN, 29/04/20)*

Our approach

1) **Trend scoping** across **12 domains of practice** based on both *individual-level data (surveys)* and *aggregate/macro-level data (practices)*

1. Work
2. Family/parenthood/love
3. Social life
4. Education
5. Leisure
6. Wellness/personal health
7. Housing/living habitats
8. Mobility
9. Consumption (cycle acquisition-use-disposal, food provision/choices, means/modes)
10. Financial security/social equality/material wellbeing
11. Citizenship
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2) Identifying those **domains most severely affected by scarcity** (critical departures from previous catalogues of action)

changes in habitual patterns, volumes and procedures

redefines values \leftrightarrow re-shapes needs/wants
as people vests more importance to goods/experiences in relatively short-supply

Socializing

Consuming

Mapping out *individual and societal effects* generating *positive and negative implications* for a sustainability project

Domains most affected by scarcity

CONSUMPTION

Unemployment, furloughs, or reduced paychecks affected **53% of Brazilian families**, more harshly among those from lower classes (65% of families from segments C2DE).

For every layoff in formal economy, 2 workers in informal economy did likewise.

For **6 in 10 Brazilians income has decreased**,
1 in 2 had a rise in expenses
Over **2/3 had to defaulted bills** due to lack of funds

(IBRE/FGV survey; McKinsey; OpinionBox).

SOCIAL CONNECTION

nearly 8 in 10 embraced **total (2 in 10) or substantial (six in 10) social isolation actions**, the latter following stay-at-home except for food provision or other emergencies

Google community mobility reports showed (early may)

-26% residential movement,
-50% displacements visits to recreational areas/parks,
-21% to workplace

Social isolation index: 53% (after 2 months of quarantine, late may)

(InLoco; OpinionBox; Google community mobility reports)

Domains most affected by **scarcity**

CONSUMPTION

SOCIAL CONNECTION

Volumes

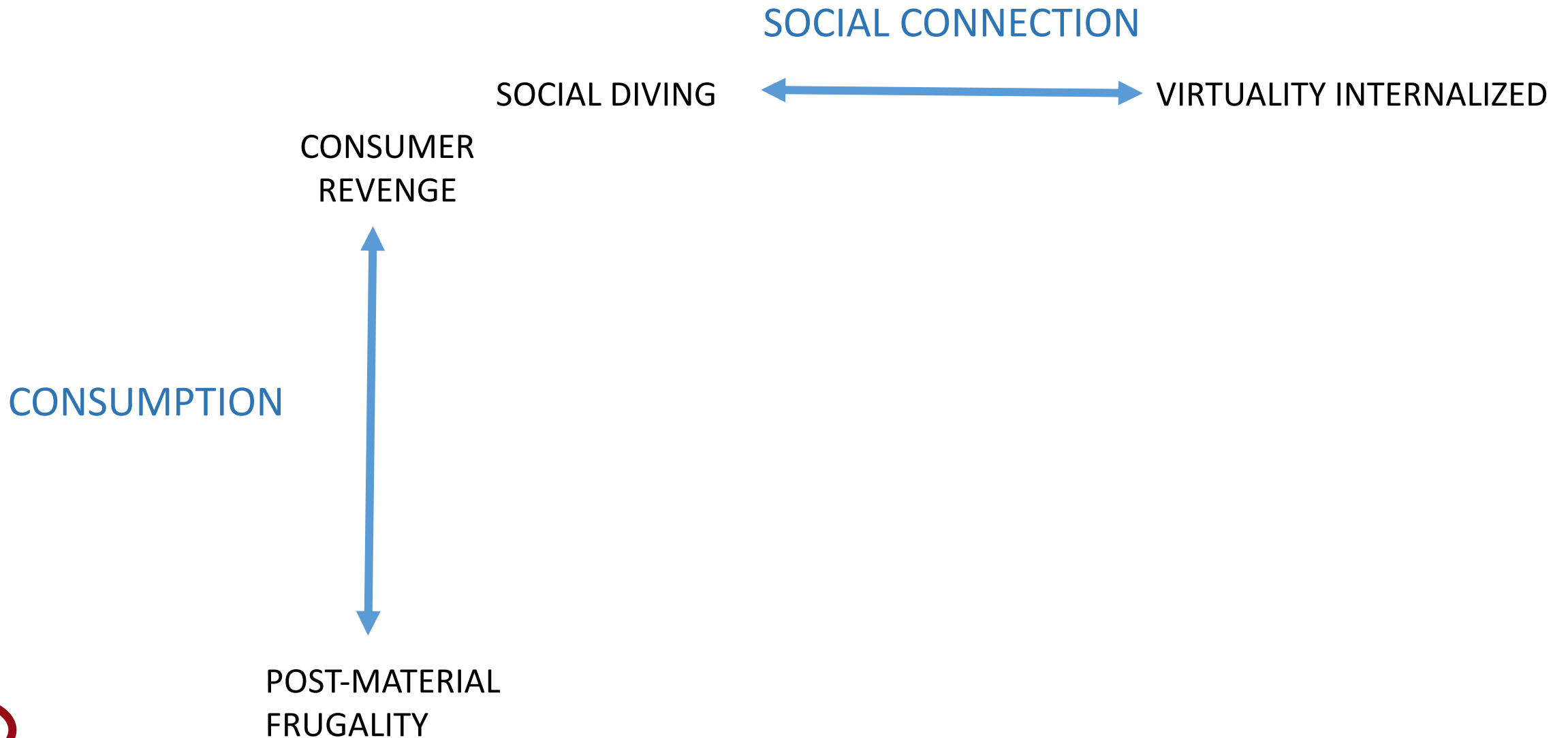
-Reduced purchasing power restricts buying to groceries, home supplies (disinfectants), and – eventually- home entertainment
-Severe declines across all other categories (clothing, apparel, accessories, cosmetics, furniture, etc)

-Continued social isolation eliminates personal, bodily contact from others
-Amount of interactions and conversations decline, specially in connection to emotional, intimacy-related, non-functional goals (unrelated to work, study, fitness)

Procedures

Goals

Post-Covid 19 Ideal-Type Responses to Consumption and Social Connection

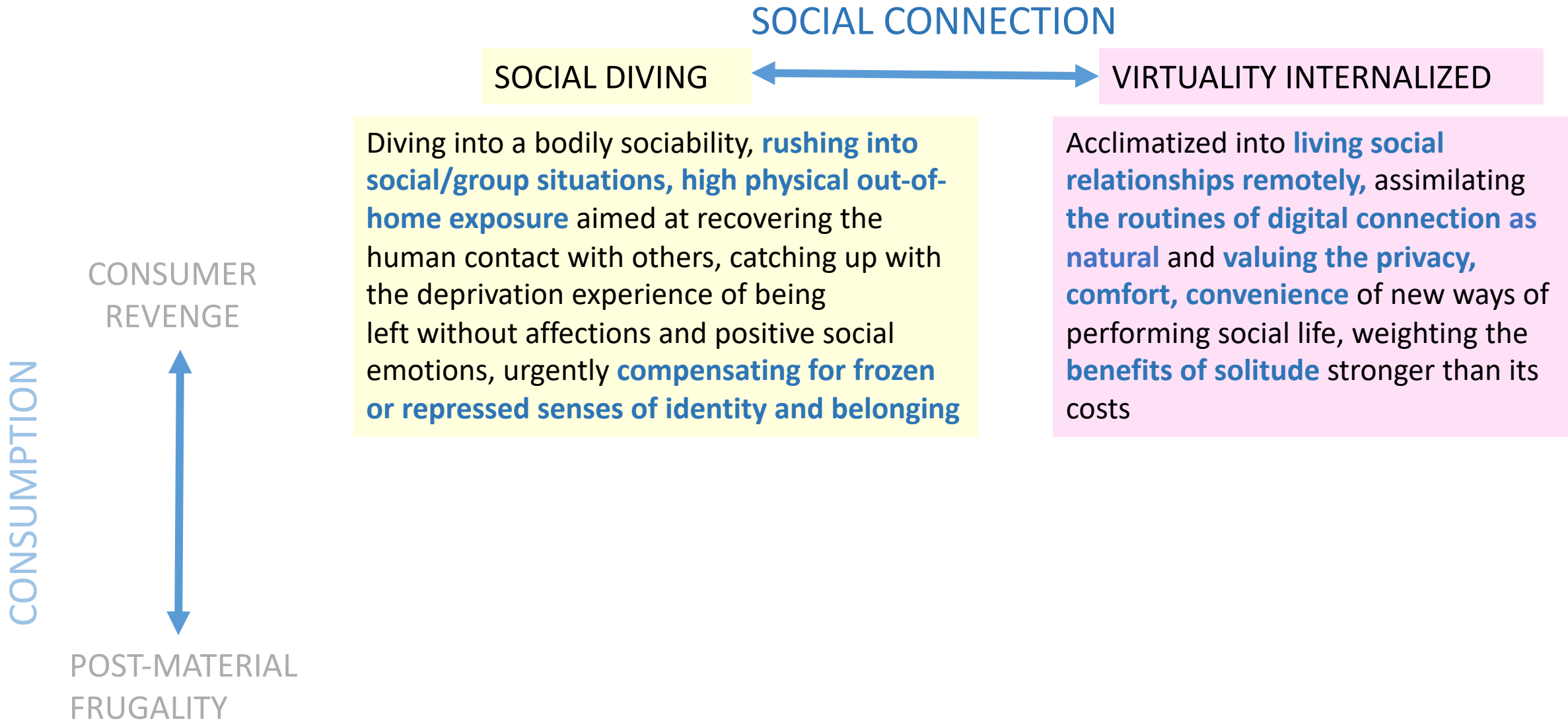


Post-Covid 19 Ideal-Type Responses to Consumption and Social Connection

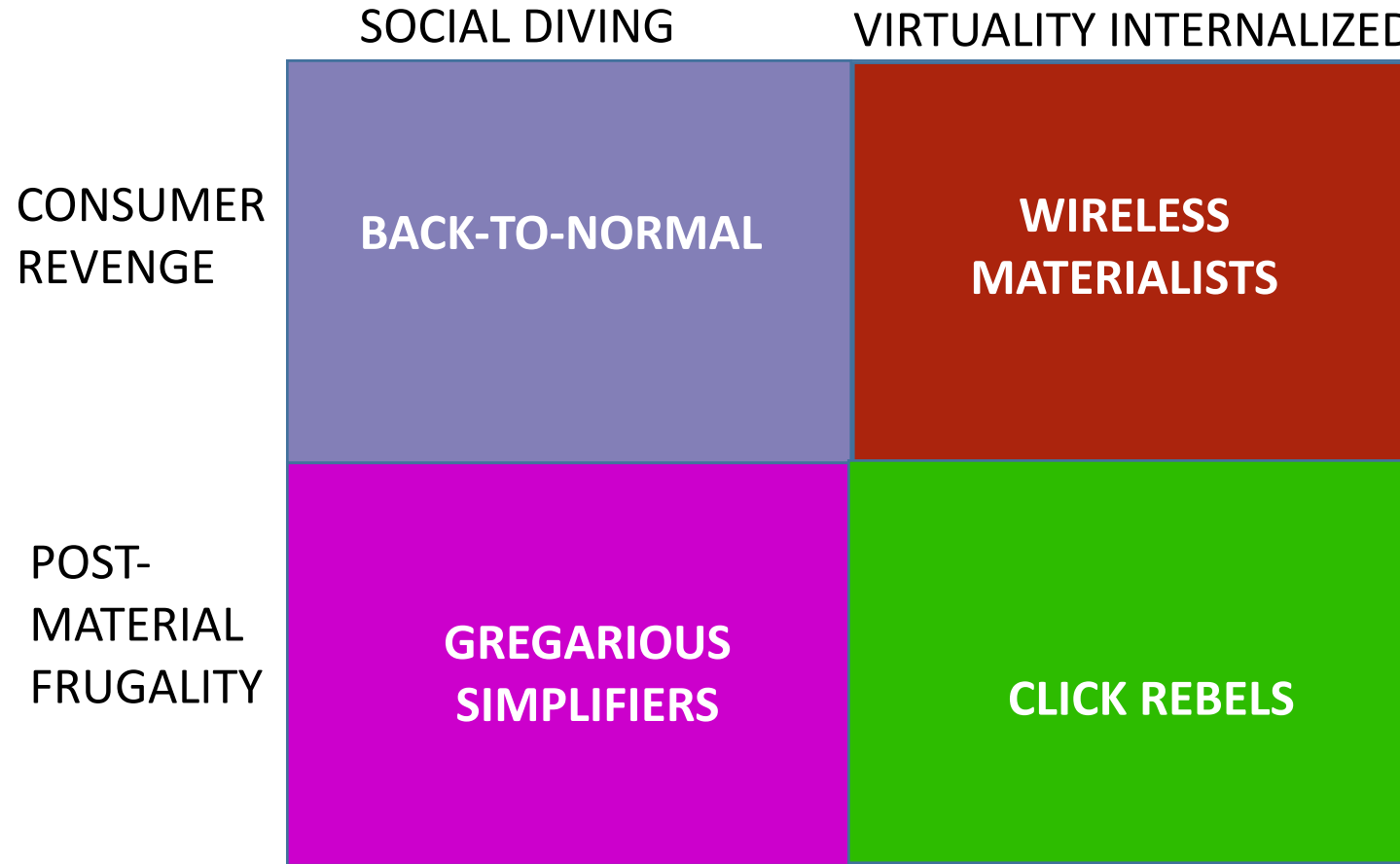


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Post-Covid 19 Ideal-Type Responses to Consumption and Social Connection



Post-Covid 19 Lifestyles Scenarios



Post-Covid 19 Lifestyles Scenarios - **MOBILITY**

	SOCIAL DIVING	VIRTUALITY INTERNALIZED
CONSUMER REVENGE	<p>BACK-TO-NORMAL</p> <p>Omniscient individualized automotive transportation as priority and status symbol</p>	<p>WIRELESS MATERIALISTS</p> <p>Mobility minimalists. Heavy reliance on digital solutions incl delivery, virtual meetings, e-commerce, e-banking</p>
POST-MATERIAL FRUGALITY	<p>Commuting thru walking/ biking Favorable to exploring safe car-pooling/ shared rides</p> <p>GREGARIOUS SIMPLIFIERS</p>	<p>Users of micro-mobility means (individualized low-impact electric scooters/bikes) while dreaming about self-driving vehicles</p> <p>CLICK REBELS</p>

Post-Covid 19 Lifestyles Scenarios - LEISURE

	SOCIAL DIVING	VIRTUALITY INTERNALIZED
CONSUMER REVENGE	<p>BACK-TO-NORMAL</p> <p>Cultural capital accumulators. Live shows, dine-outs, world air travelling are a must to be posted online for display</p>	<p>WIRELESS MATERIALISTS</p> <p>24x7 news consumption. Avid high-end immersive tech user for home entertainment and online gambling</p>
POST-MATERIAL FRUGALITY	<p>Outdoor, natural surroundings trips as top leisure priorities. Involved in DIY hobbies and nostalgia-related analogic games</p> <p>GREGARIOUS SIMPLIFIERS</p>	<p>Cloud-based collaborative game playing. Virtual visits to museums, destinations, gamified meetings</p> <p>CLICK REBELS</p>

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Thank you...!