

**KANTAR**

Anticipating  
the Balance  
of 2020



GLOBAL Scenarios exploring COVID-19

# Background

The Futures Practice at Kantar has developed a set of COVID-19 scenarios. Our hope is that in doing so, we can elevate the discourse from “what is happening?!?” to “what happens next?” and “how can we best prepare?”

The scenarios are not a long-term view of the world 5-10 years after the crisis, but instead explore plausible ways things may evolve over the next 6-12 months or so. We have chosen this time horizon because we firmly believe that in an event as fluid and unprecedented as this, businesses need clarity about the crucial period beyond the current crisis—but before the crisis has fully faded and a new normal has been reached. In our minds, the most pressing question facing businesses today is how they should plan for the balance of 2020 and 2021.

Through a combination of analysis and discussion, we have isolated three critical uncertainties to explore through these scenarios. They are:

HOW  
**PEOPLE**  
WILL BEHAVE

HOW  
**THE DISEASE**  
WILL BEHAVE

HOW  
**INSTITUTIONS**  
WILL BEHAVE

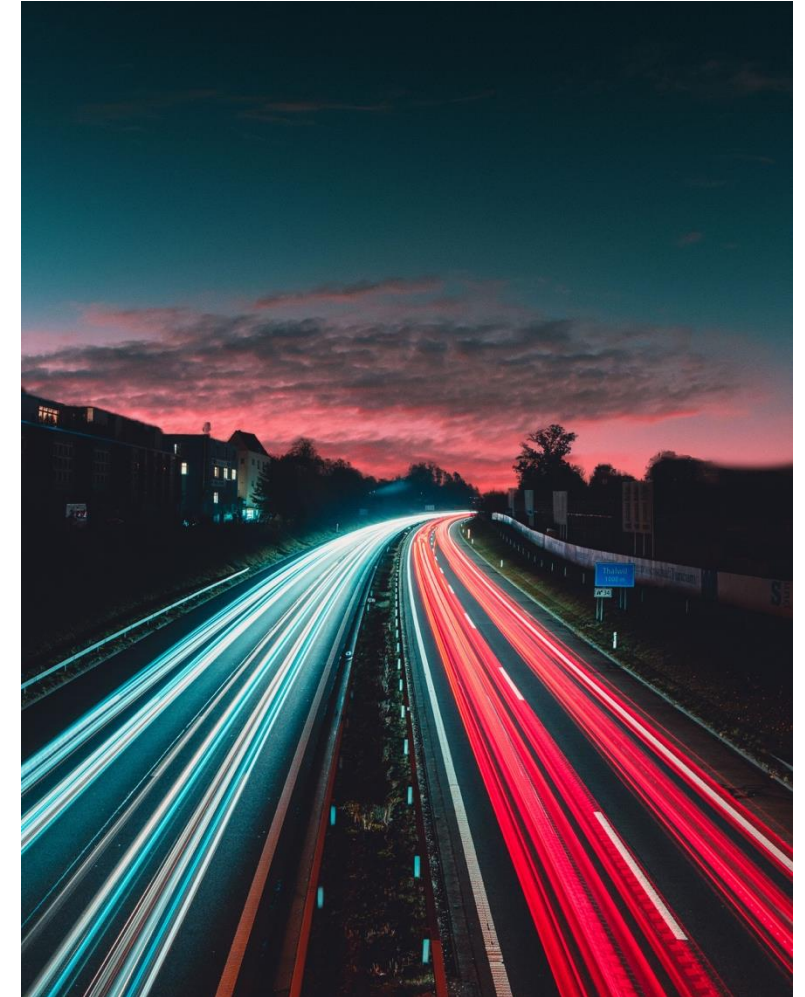
By combining these uncertainties, we are able to describe a range of alternative futures. Some are mildly disruptive while others paint a pretty dire picture of the future that none of us would wish for.

The scenarios are not predictions, but they are meant to be equally credible and plausible based on what we currently know. They are also meant to be provocative enough to spark debate and discourse.

Thus, they are a tool for planning and action—not plans in and of themselves. Used properly, they can and should give leadership teams clear guardrails for what to expect as this unprecedented moment in time settles in and becomes our reality.

We hope that the possible alternative futures we have constructed here prove useful for you and your colleagues.

We look forward to hearing from you with how these helped, where they left you wanting more, and what questions we can help you explore further.





# Objectives



1

To provide Kantar and its clients with a set of different scenarios describing how the current crisis might evolve over the next 1-2 years.

2

To help organisations gain perspective and make sense of a rapidly changing and fluid situation.

3

To help organisations move beyond the reactive stance they are currently in and anticipate what comes next and how to best prepare.

## How to think about scenarios

### They are...

Descriptions of alternative coherent and plausible futures

Narratives of the evolving dynamics of the future

Specific strategy-focused views of the future that create a view of future possibilities

### They are not...

Predictions

Variations around a midpoint/base case

Generalised views of feared or desired futures

## About scenarios—*Defining the alternatives*

Scenarios, when done right, paint the extreme plausible futures

A

C

B

D

## About scenarios—*think beyond a single future*

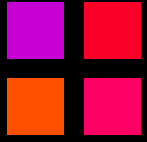
The “real” future that plays out may include elements of all of the scenarios, with some playing out more strongly in different parts of the world

A

C

B

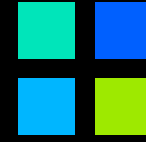
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SCENARIO SET 1

# People Point of View

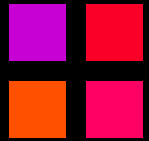
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SCENARIO SET 2

# Institutional Point of View

Pages 22-35



SCENARIO SET 1

# People Point of View





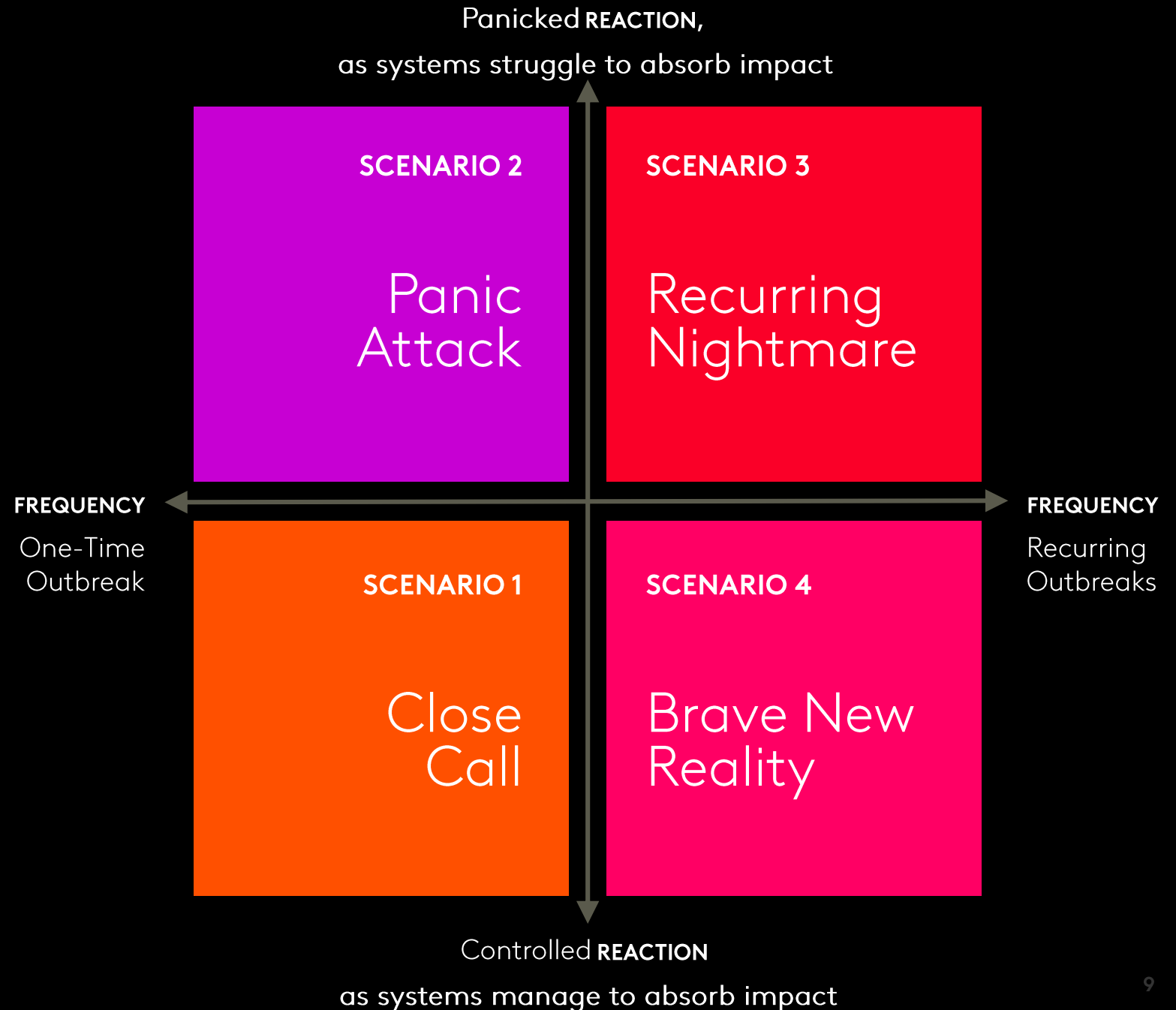
# People Point of View

## Four Possible Futures

These scenarios were developed by examining two key uncertainties:

- How the virus behaves in the form of the frequency of the outbreak i.e. a one-time outbreak or repeated, recurring outbreaks
- How people behave in the form of their emotional reaction i.e. controlled response or panicked response to what is going on

The scenarios should be read as a set exploring the boundaries of possibilities—they are like the “tent pegs” at the corners of the future. It is possible that the future will actually contain elements of each of these scenarios or that different scenarios become more dominant in specific geographies over time.





# Close Call

## One-Time Outbreak, Controlled Reaction

The public health system is strained by COVID-19 but not to the point of breaking. Cancellation of schools, sporting events, social and religious gatherings as well as other “temporary” lockdown measures—along with a redoubled effort to roll out testing kits and fast-track other innovative ways to increase critical health care provision—slow the spread of COVID-19. People heed governments’ pleas to stay at home, distance themselves from others and remain vigilant but calm.

After the initial selloff, markets stabilize. A moderate recession takes hold during the months in which nations battle the virus, but the economy is saved from a severe recession by aggressive government action. As infection rates decline, consumer confidence rebounds. The worst is over by June/July 2020 in the great majority of markets and after controls are lifted consumers quickly return to previous levels of consumption with many splurging after several months of low levels of spending and pent-up demand.

This is particularly the case where Governments intervened quickly to devise plans to support the majority of businesses through the crisis and the majority of workers in vulnerable sectors therefore kept some source of income during the peak of the crisis.



# Scenario Details

Close Call  
One-Time Outbreak,  
Controlled Reaction

## Business

- Employees take extreme social distancing measures and leaders rapidly develop ways of working centred around remote working
- Productivity dips initially but rebounds as employees adjust and find efficiencies
- Business and Government co-operate to ensure that workers receive wages and keep jobs through the peak of the crisis
- Blue-collar workers are given the protective equipment necessary to continue to perform critical economic functions

## Retail

- Spike in demand for key cleaning supplies and food staples. On and off-line retail environments adapt offerings to ensure consumer fulfilment accordingly
- Mixture between physical retail and e-commerce adjusts quickly to suit a reality where "social distancing" is the new normal for a few months
- Delivery systems and businesses innovate to reflect a sudden shift in demand and phase back into normal by Q4 2020, making up for some earlier losses through fulfilment of pent-up demand



# Scenario Details

Close Call  
One-Time Outbreak,  
Controlled Reaction

## Cultural & Consumer

- People are much more focused on health and hygiene concerns in the short term
- People have a sense of having narrowly skirted disaster, which leads to a sense of optimism and resiliency and new-found belief in community
- People reassess their values and how they spend their time. Former distractions, now revealed as superfluous, lose their appeal as positive civic participation rises amongst the younger generations
- Massive upsurge in use of virtual experiences and connection, although desire for face to face contact and experiences picks up immediately after Government controls are lifted
- Millennials in particular are hit by the economic decline, as it impacts their ability to make payments on debt, home loans etc.
- Younger generations like Gen Z are infused with a sense of can-do spirit and additional resilience driven by their ability to get by in a crisis
- Some new behaviours stick beyond the crisis, e.g. greater use of e-commerce and virtual experiences/sources of connection, but no other major shifts in consumer and shopper behaviour







# Panic Attack

## One-Time Outbreak, Panicked Reaction

National and municipal authorities are unequipped to handle public hysteria caused by the pandemic. Health systems around the world come under extreme pressure as people hoard supplies, clamour for testing and treatment, and take advantage of public services even if ultimately unnecessary. Lack of an agile and innovative response by Governments, businesses and society leads to sense of panic as the outbreak hits its peak.

Despite some Governments ramping up efforts to stop the freefall, the wide array of fiscal interventions fail to combat a biological event which healthcare systems, food supply chains and economic systems are simply not resilient enough to withstand. A global recession ensues as fear overpowers attempts to shore up the economy.

Many SMEs, including the self-employed struggle to survive the crisis. Those most vulnerable and without a safety net suffer the greatest and there are sparks of social unrest in some countries as the crisis threatens to impact them the most, while big businesses and those at the opposite end of the social spectrum appear to be relatively less impacted.



# Scenario Details

Panic Attack

One-Time Outbreak,  
Panicked Reaction



## Business

- White collar employees take extreme social isolation measures. Leaders must respond to employee reluctance to return to work as front-line employees in key sectors increase demand to be compensated for increased personal risk
- Productivity takes a sharp dip that lasts even after the end of the crisis
- Flaws in existing business models are brought to life. Restructuring in many places it is too little too late
- Out-of-home services, entertainment, and travel cease completely during the crisis and only recover slowly after it has passed

## Retail

- Initial spike in demand for essential goods (cleaning supplies and food staples) continues through the peak of the crisis, leading to rationing of many of these items in some markets
- Reliance of delivery and logistics systems on poorly paid workers who are at great risk exposes major flaws in existing retail and e-commerce models
- Physical Retail suffers medium term as consumption shifts to online and low interaction/click and collect style models



# Scenario Details

Panic Attack

One-Time Outbreak,  
Panicked Reaction



## Cultural & Consumer

- Protection from exposure at all costs is top of mind
- Societal and political divides are exacerbated in an atmosphere of mistrust
- Frustration at the Government and Business response leads to signs of social unrest in those places where the most vulnerable parts of the population feel let down and left to fend for themselves by Government and society
- People stay closer to traditional "tribes" and become even less trusting of perceived outsiders
- Faith in institutions is severely eroded. Self-reliance is the norm throughout the crisis as trust is only slowly rebuilt
- "Security in scale" leads to a desire to gain more full time paid, rather than casual small scale self-employment in future
- Older Generations cut back spending even more than most
- Gen Xers and Millennials are hit hard by the economic impact as well as the need to support parents and/or children
- Gen Z feel like this event has impacted their chances of achieving their aspirations





# Recurring Nightmare

## Recurring Outbreaks, Panicked Reaction

The initial 2020 pandemic causes a substantial economic downturn, and before the global economy and healthcare systems can fully recover, the next wave of outbreaks begin. Consumers' anxiety levels spike, and stock sell-offs erase gains made since the market losses of early 2020 and markets lose confidence as there is little sign of an effective vaccine.

Businesses have to adjust to new cycles that oscillate between consumers socialising and splurging, and consumers distancing and hibernating. The repeated cycles inject a new level of instability and complexity for everything from staffing, to cashflow, to logistics.

Health systems and supply chains come under extreme pressure as each new outbreak overloads systems that are far too slow to adapt and increase capacity. The public also tire of controls and failing systems. Governments in some markets face mass social unrest as the virus is seen as uncontrolled and some countries and parts of society are increasingly feeling like they are left to fend for themselves and with little social safety net to fall back on.





## Scenario Details

## Recurring Nightmare

Recurring Outbreaks,  
Panicked Reaction



### Business

- New ways of working take hold, including drastic limits on travel for prolonged periods
- Service industry permanently contracts, with little prospect of returning to year-round close physical contact
- Large lay-offs happen with each outbreak
- Investment in digital collaboration platforms will increase and drive new technology development and infrastructure build-out

### Retail

- Shopping behaviours and spending patterns are reshaped by a new rhythm of preparation for hard times that always seem just around the corner
- When key products become available, buying more “just in case” rather than relying on “just in time” becomes a key shift for those who can afford it, while others struggle to find what they need
- Pop-up retail becomes the norm as year-round spaces no longer make economic sense
- E-commerce has to adapt to new rhythms, dominated by periodic peaks in demand



# Scenario Details

## Recurring Nightmare

Recurring Outbreaks,  
Panicked Reaction

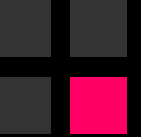


### Cultural & Consumer

- Health concerns dominate all others as people seek ways to stay fit while limiting group contact
- People spend more time apart from each other than ever, but have a strong craving for connection—increasingly met through digital group experiences
- Government intervention is seen as ineffective, while food/health systems in many countries are not equipped to cope with continuing outbreaks
- Large degree of social unrest, particularly in those markets and parts of societies who are most vulnerable and don't have a safety net
- People turn almost completely away from existing institutions, which are recurring reminders of their failure in the crisis
- Pressure at borders as those in most impacted countries look to move to places that are perceived as safer and more co-ordinated in their approach to the recurring outbreaks
- Importance of having a stable job in large well capitalised companies with strong workforce policies shifts how people see employment
- Some older consumers with nest eggs decide to spend their money or pass it onto younger generations
- Gen Xers and Millennials demand changes to the systems and put renewed emphasis on saving, while Gen Z are at the heart of movements pushing for a new social order







# Brave New Reality

## Recurring Outbreaks, Controlled Reaction

The absence of an effective vaccine means that outbreaks continue to occur in many markets. However society recognises that the best way to contain the impact of the disease is to comply with a series of measures and widespread testing programmes, that are put in place to protect public health and economic stability. People develop new habits for work, travel and socialising, which are increasingly embedded as new social norms.

Public and private sector actors come together to make systematic changes to help deal with the new seasonal pattern of outbreaks. New regulations focus on sanitation and cleanliness as well as greater control of movement and travel, particularly in peak periods. Supply chains and health systems also adapt and become more agile and innovative and therefore better able to cope with each outbreak as it occurs.

In most markets each outbreak is smaller than the previous one, so people see the benefit of observing these new behaviours. The economic downturn during the initial 2020 outbreak is severe and demand in many sectors never gets back to pre-2020 levels, but investors, businesses and markets begin to learn how to navigate this fundamentally altered marketplace.



# Scenario Details



## Business

- New ways of working take hold, including drastic limits to travel
- Investment in digital collaboration platforms will increase and drive new technology development
- Industries reliant on large crowds, social gatherings or consumer mobility either become more seasonal or adapt their assets & business models to other things (e.g. virtual experiences, delivery)
- Productivity remains permanently below pre-crisis levels

## Retail

- Seasonal spikes in demand for key cleaning and food products are built into planning cycles
- Thriving peer-to-peer & local /community marketplaces emerge as people try to help each other through bad times
- Retail spaces adapt to new sanitary and cleanliness standards, as well as a clear shift to non-contact /e-commerce /delivery /click and collect models
- Consumers adapt shopping and mobility patterns while keeping their health in mind. Opening hours for key workers and the most vulnerable become commonplace





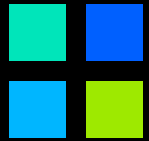
# Scenario Details



## Cultural & Consumer

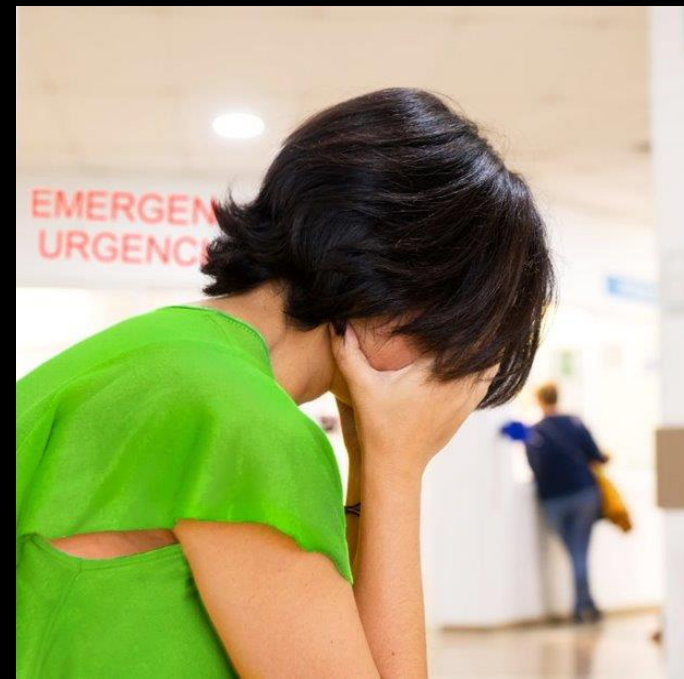
- Health and wellbeing become a pervasive concern—with a much greater focus on limiting physical damage while promoting emotional wellbeing—in contrast to the previous focus on health optimisation.
- A grim resolve defines mindsets as the world adjusts to a new normal with fewer of the pleasures previously known; this shift is also reflected in style and aesthetics, which become more functional and less frivolous or luxurious in nature
- Social distancing practices results in a no-touch culture taking hold
- Traditional cultural, social events and holidays adapt to new peak travel and entertainment seasons
- Virus passports, carried via digital testing apps are key to being allowed to move freely, within and between geographies
- The older generation adopts more self-imposed “hibernation” practices, avoiding large gatherings, peak hour public transport / shopping trips and less out of home entertainment, drinking or eating
- Those of core working age create new norms of community engagement to support parents, each other and also their children through crisis
- For Gen Z, this is a watershed era that shapes their worldview, leading them to adopt a cautious but innovative approach to social interactions





SCENARIO SET 2

# Institutional Point of View



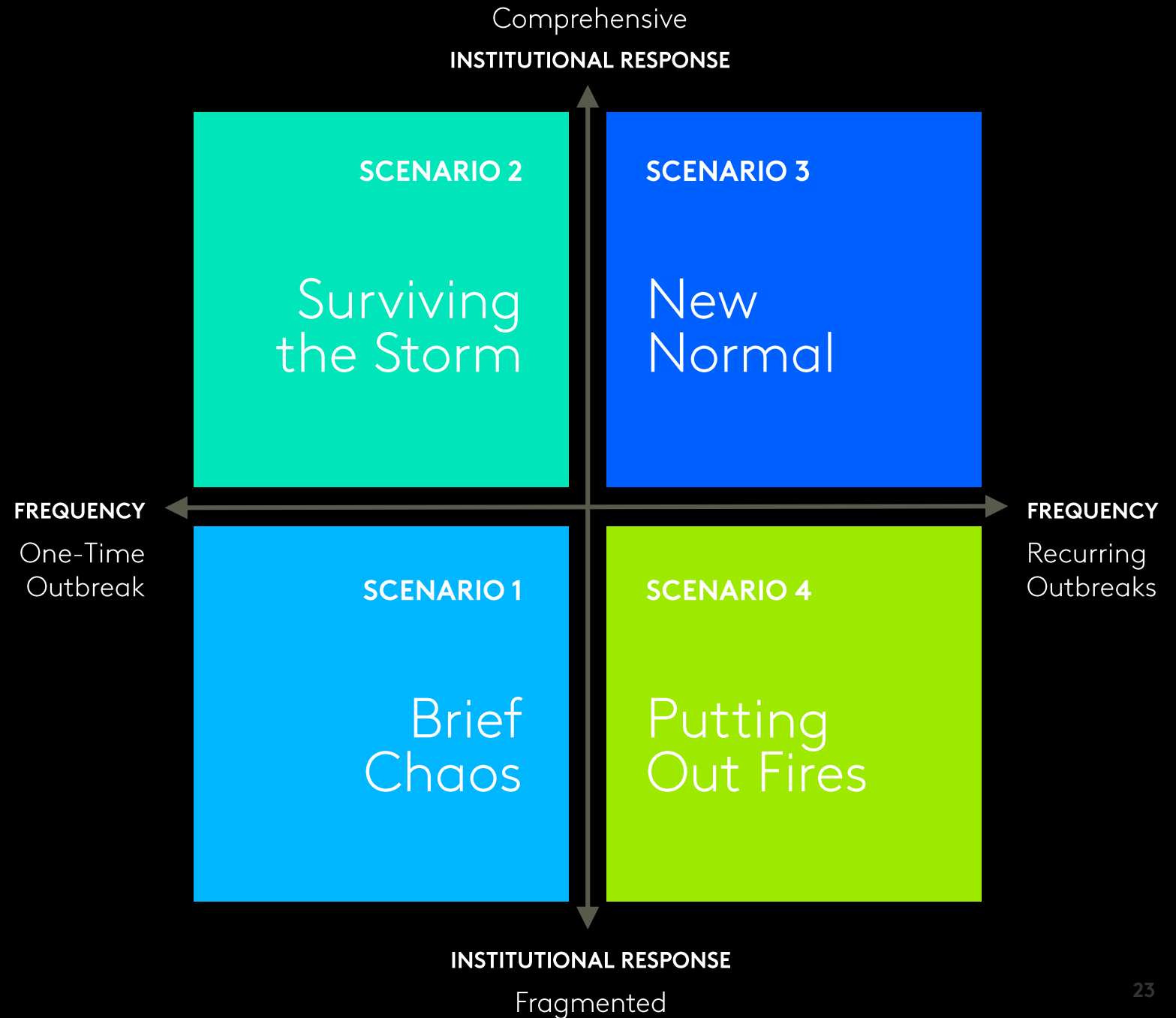
# Institutional Point of View

## Four Possible Futures

These scenarios were developed by examining two key uncertainties:

- How the **virus** behaves in the form of the frequency of the outbreak i.e. a one-time outbreak or repeated, recurring cycles of outbreak
- How **institutions** respond in the form of either a fragmented or comprehensive response

The scenarios should be read as a set exploring the boundaries of possibilities—they are like the “tent pegs” at the corners of the future. It is possible that the future could contain elements of each of these scenarios or that different scenarios become more dominant in specific geographies over time.







# Brief Chaos

## One-Time Outbreak, Fragmented Institutional Response

Fragmented public health and government responses make the outbreak more severe and long-lasting in a number of geographies, especially those that were slow to act or unable to implement the controls necessary to contain the virus, often due to a mixture of poor decisions and overwhelmed infrastructure.

Interventions at the global and national level are derided as unfocused and insufficient, with benefits distributed unevenly. Some groups try to take matters into their own hands defying institutional guidelines, causing social unrest and further prolonging the outbreak. Many businesses, suffer during a prolonged period of closure or reduced demand, with many jobs being lost in the short-term and little sign of them returning in the immediate term.

Those people with little access to social safety nets, food and healthcare suffer the most with homelessness and food poverty increasing alongside the direct health and economic impacts of the virus. Even in more developed markets, health infrastructure is stretched to breaking point for a short period, especially in virus hotspots. Eventually the virus burns itself out, as testing programmes and lockdown measures are enhanced, but it leaves a deep scar on the global psyche and on the worst effected geographies in particular.





# Scenario Details

## Business

- Restaurants, entertainment and small businesses all struggle to survive. Many are forced to close, especially in those geographies where they are not offered any Government support
- Poor institutional response creates an opportunity for the private sector, and some global and local companies step up to help empower communities to find their solutions, generating lasting equity
- Other companies creatively adapt their existing assets for crisis use – delivery networks, manufacturing capabilities, etc, reimagining themselves as new “emergency services” in the minds of the public

## Retail

- Stockpiling of essential goods leads to local rationing in the near-term and continues to the end of the year in some geographies
- All, but truly essential physical retail (pharmacies, food), closes for prolonged period in many markets
- Consumption shifts online, and to low-interaction delivery/e-comm/click and collect methods
- Most major retailers enforce strict new hygiene precautions for employees and shoppers





# Scenario Details

## Cultural & Consumer

- Scepticism of global/national governance rises. Trust grows in community or local organisations and those individual services (like healthcare) or businesses that show their effectiveness
- Instability and uncertainty promote a savings/back to basics mindset that lowers consumer willingness to spend for months, if not years, after the crisis is over, as they focus on securing more basic needs
- Discontent in the most vulnerable economic populations spikes as they struggle with employment, homelessness, as well as access to basic food, hygiene and services in some geographies
- Older generations are hard-hit by the virus, with this demographic hit hardest by the virus in many developing markets and in western markets, seeing their retirement savings wiped out in a slow market recovery, forcing those currently around retirement age to work longer and stress more in the later years of life
- The shape of the Millennial and Centennial workforce aspirations changes as small businesses and freelance work become discredited and they turn to jobs and companies that are seen as more resilient
- Innovation suffers as a result in many parts of the world, further impacting the slow economic recovery





# Surviving the Storm

## One-Time Outbreak, Comprehensive Institutional Response

After a rough start, governments around the world take the lead, each co-ordinating a strong and comprehensive response that is enacted with precision. Many sectors and businesses shut their doors but ride out the storm, supported by Government intervention targeted to support the most impacted industries and workers. Other businesses play a more public role, redeploying manufacturing or logistics to new public-oriented tasks. The global effort is helped by co-ordination across the G20, who work with the World Bank and IMF to devise plans that allow debt relief for many of the world's poorest and most indebted countries.

People comply with quarantines/lock downs and recommendations on social distancing, and take health advice seriously. While the measures are draconian, one by one nations "flatten the curve", limiting the total number of cases, and avoiding swamping healthcare systems.

While the immediate hit to global and national economies is deep, the recovery is relatively strong. However there remain longer term issues related to how National Governments are going to pay for the packages they put in place to help businesses and workers ride the worst of the storm.





# Scenario Details

## Business

- Companies abide by national quarantine measures
- Many deploy their existing assets and capabilities towards helping the public, national governments and international bodies deal with the virus
- Businesses dependent on delivery & e-commerce, thrive but some are overloaded with demand. Others without these capabilities seek out partners so they can participate in the marketplace
- Companies and national governments co-operate to ensure that workers receive enough money to survive the crisis period

## Retail

- The convenience of e-commerce/delivery/click and collect mechanisms takes hold for many affluent shoppers, but lower income shoppers rely more on community groups
- Spending declines but less drastically, since most people have a safety net; spending and shopping behaviour start to rebound by the end of 2020 in most markets around the world
- Special hours for key workers and vulnerable groups become commonplace





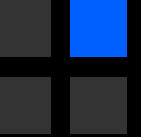
# Scenario Details



## Cultural & Consumer

- Society comes together and people abide by sometimes very draconian measures in the belief that it is for the greater good
- The importance of collective security and public health is reinforced, promoting a sense of collectivism and reinforcing the importance of community ties in people's minds
- Confidence in the ability of the government to respond to crises is restored, pushing back against the tide of government mistrust
- Social distancing fades eventually but vestiges remain to the end of 2020, including less handshaking, more remote working and hand washing
- Bored customers demand more entertainment to fill their days, increasing viewership of streaming content like eSports; demand strains infrastructure of companies like YouTube and Twitch as well as Internet Service Providers
- The impact of Government and Big Businesses during this time feeds greater focus on civic participation and good governance and helps create among Centennials a new respect for the importance of Government and Big Business





# New Normal

## Recurring Outbreaks, Comprehensive Institutional Response

With the muscle memory from the initial outbreaks in place, global institutions and national governments are well-placed to respond when ensuing waves of outbreaks occur. The playbook of draconian lockdown measures alongside effective testing programmes and an unprecedented degree of private and public sector collaboration makes COVID-19 a more predictable, if still deadly, periodic occurrence. This is further helped by G20, World Bank and IMF agreeing to provide huge amounts of debt relief for the poorest and most impacted parts of the world.

The economic downturn of the initial 2020 outbreak is severe, but investors and businesses begin to learn how to navigate this fundamentally altered marketplace. Stock markets become adept at pricing virus-related risks and impacts, limiting volatility. The economic system re-oriens around COVID-19 with a new focus on "minimising risk and maximising resilience" taking priority over "maximising efficiency."

Technologies that enable productivity and leisure during COVID-19 season, like telehealth, video conferencing, e-learning, and communications infrastructure all see adoption rise throughout 2020 and into 2021, as do those responsible for cleaning and hygiene products.



# Scenario Details

## Business

- Accelerated investment in technology infrastructure that enables remote working
- Unprecedented collaboration with public sector bodies at local, national and global levels
- Logistics and last-mile providers will see demand increase during infection "season"; many diversify and partner to provide cross-platform services (food delivery as part of Netflix subscriptions, for instance)
- Organisations fundamentally alter their business models and ways of working to adapt to the new challenges of social distancing and long-term downsizing as well as considering more "dual" locations for key functions to hedge against a single location having an outbreak & going under lockdown in future

## Retail

- Accelerated development and adoption of automated, staff-less stores as well as new forms of e-commerce and delivery
- Delivery, online, click and collect show increased seasonal demand; employment remains steady as workers shift fluidly from front-line to back-room and back again
- Social distancing in physical retail spaces, revised/special shopping hours and new shopping behaviours embed themselves, not just in outbreak season





# Scenario Details

## Cultural & Consumer

- People adjust their rhythms around the level of outbreaks, avoiding peak travel periods. Flexible working and travel becomes truly flexible
- Social distancing practices results in a no-touch or less touch culture taking hold
- Sports, religions and other events dependent on large social gatherings (e.g. clubs, bars etc) must adopt new ways to engage. Public spaces and major venues, as well as bars, restaurants and other entertainment venues have to undertake heightened outbreak security measures
- Workers, particularly migrant workers look to move to geographies that are felt to be more safe, secure and co-ordinated in their response to the crisis
- Dependence on social safety nets, especially during outbreaks, will be considered normal and not looked down upon as they are today
- The adoption of e-learning and instant-teaching methods reshapes expectations of Gen Z and Gen Alpha for education
- For those in the 50+ age bracket, the need to avoid large groups during outbreak season will reshape both what and where they spend their money and time (less travel, or entertainment/eating/drinking out of home) as well as how large family gatherings occur







# Putting Out Fires

## Recurring Outbreaks, Fragmented Institutional Response

Governments around the world are uncoordinated and poorly targeted in their response to the initial outbreak. The lack of a vaccine along with the responses at both global and national level leads to a pattern of continuing outbreaks which have varying degrees of negative impact across the world.

Health systems and authorities quickly reach breaking point in many countries. This is the case across much of Latin America, Africa and parts of Asia, where a mix of high density low-middle income populations and a lack of intervention in the economy, leaves many of the poorest vulnerable.

Trust in institutions and businesses, due to their lack of agility and ability to coordinate an effective response, despite the fact some big businesses protect their workers, which only adds to the feeling of polarisation.

There is social unrest in places where the vulnerable in society have little choice but to break controls to earn a living or try to get basic provisions for their families. Some parts of the global population seem to have become desensitised to recurring outbreaks and the mortality it brings, until finally it subsides after the rollout of an effective vaccine.



# Scenario Details



## Business

- More layoffs happen with each outbreak. Uneven responses within and between countries leads to stability for workers in some areas, but not in others
- Businesses build more resilient supply chains with duplicate vendors from multiple geographies to hedge against the next virus hot spot
- New industry of roving virus-response teams develops for rapid deployment to new hot spots by humanitarian organisations, supported by some large corporations who help to fill some of the gaps
- More businesses look to hedge against the next outbreak by moving key functions, including manufacturing and blue/white collar roles to a greater mix of locations

## Retail

Long-term uncertainty depresses consumer confidence and spending, resetting the baseline to a much lower level for some time to come

- Pop-up retail becomes the norm, and physical retail is a much smaller part of overall demand. The right sizing of physical retail takes place in many markets.
- Widespread adoption of delivery-based and contactless retail for those who can afford it shifts logistics towards local warehousing and agile production production-on-demand



# Scenario Details



## Cultural & Consumer

- The importance of having a stable job at large, well-capitalised companies with strong workforce policies shifts how people view employment
- Large religious gatherings, sports and other out of home entertainment and travel all stall as do bars and restaurants as both the economic and social consequences of recurring outbreaks take hold
- This stalls the growth in the physical side of the experience economy, putting further pressure on the vulnerable in society
- Digital forms of connection and virtual experiences all become part of the norm for the middle classes and more affluent in society
- Xenophobia and scapegoating increase. There is pressure on borders as migrant workers in the worst impacted locations move to those areas which they feel are more safe, secure and co-ordinated in their approach to the outbreaks
- Fewer of the previously wealthy older generations in America, Western Europe and Japan, can retire comfortably, while whole generations of the vulnerable are wiped out by the virus
- Those in their peak earning years are severely squeezed causing great stress and anxiety and re-emphasizing the importance of saving over discretionary spending
- Younger Millennials and Gen Z call for system change to make sure this can't happen again



# Questions to Consider





# Initial Reactions: Scenario Set 1

OUTBREAK BEHAVIOR x REACTION BY PEOPLE



What are your initial reactions to the four scenarios in set 1?

**Close Call** (One-Time Outbreak, Controlled Reaction)

**Panic Attack** (One-Time Outbreak, Panicked Reaction)

**Recurring Nightmare** (Recurring Outbreaks, Panicked Reaction)

**Brave New Reality** (Recurring Outbreaks, Controlled Reaction)

Which future would be most challenging to your organization? Why?

Which would be the easiest future for your organization to navigate? Why?

# Initial Reactions: Scenario Set 2

OUTBREAK BEHAVIOR x INSTITUTIONAL RESPONSE



What are your initial reactions to the four scenarios in set 2?

**Brief Chaos** (One-time Outbreak, Fragmented Response)

**Surviving the Storm** (One-Time Outbreak, Comprehensive Response)

**New Normal** (Recurring Outbreak, Comprehensive Response)

**Putting Out Fires** (Recurring Outbreak, Fragmented Response)

Which future would be most challenging to your organization? Why?

Which would be the easiest future for your organization to navigate? Why?

# Scenario Implications



Choose a Scenario Set and consider the following questions for Scenario 1 from that set. Repeat for the other set if you wish.

What strengths or assets does your company have to help it weather this scenario?

What weaknesses does your company have that would hinder it in this scenario?

What opportunities would there be for your industry and company in this scenario?

What are the greatest threats to your industry and your company within this scenario?



# Scenario Implications



Choose a Scenario Set and consider the following questions for Scenario 2 from that set. Repeat for the other set if you wish.

What strengths or assets does your company have to help it weather this scenario?

What weaknesses does your company have that would hinder it in this scenario?

What opportunities would there be for your industry and company in this scenario?

What are the greatest threats to your industry and your company within this scenario?

# Scenario Implications



Choose a Scenario Set and consider the following questions for Scenario 3 from that set. Repeat for the other set if you wish.

What strengths or assets does your company have to help it weather this scenario?

What weaknesses does your company have that would hinder it in this scenario?

What opportunities would there be for your industry and company in this scenario?

What are the greatest threats to your industry and your company within this scenario?

# Scenario Implications



Choose a Scenario Set and consider the following questions for Scenario 4 from that set. Repeat for the other set if you wish.

What strengths or assets does your company have to help it weather this scenario?

What weaknesses does your company have that would hinder it in this scenario?

What opportunities would there be for your industry and company in this scenario?

What are the greatest threats to your industry and your company within this scenario?



# Summary



What can you do today to reduce the negative impacts and increase resilience should your worst case scenarios occur?

What strategies and capabilities would a business need to thrive should your best case scenario occur?

# Summary



Looking across all the scenarios, what must your business do to THRIVE in any scenario?

**People, Talent & Resources**

**Portfolio (Sectors/Categories, Brands, Price Points)**

**Products, R&D & Technologies**

**Partnerships**

**Channels (Media, Retail etc)**

**Other**

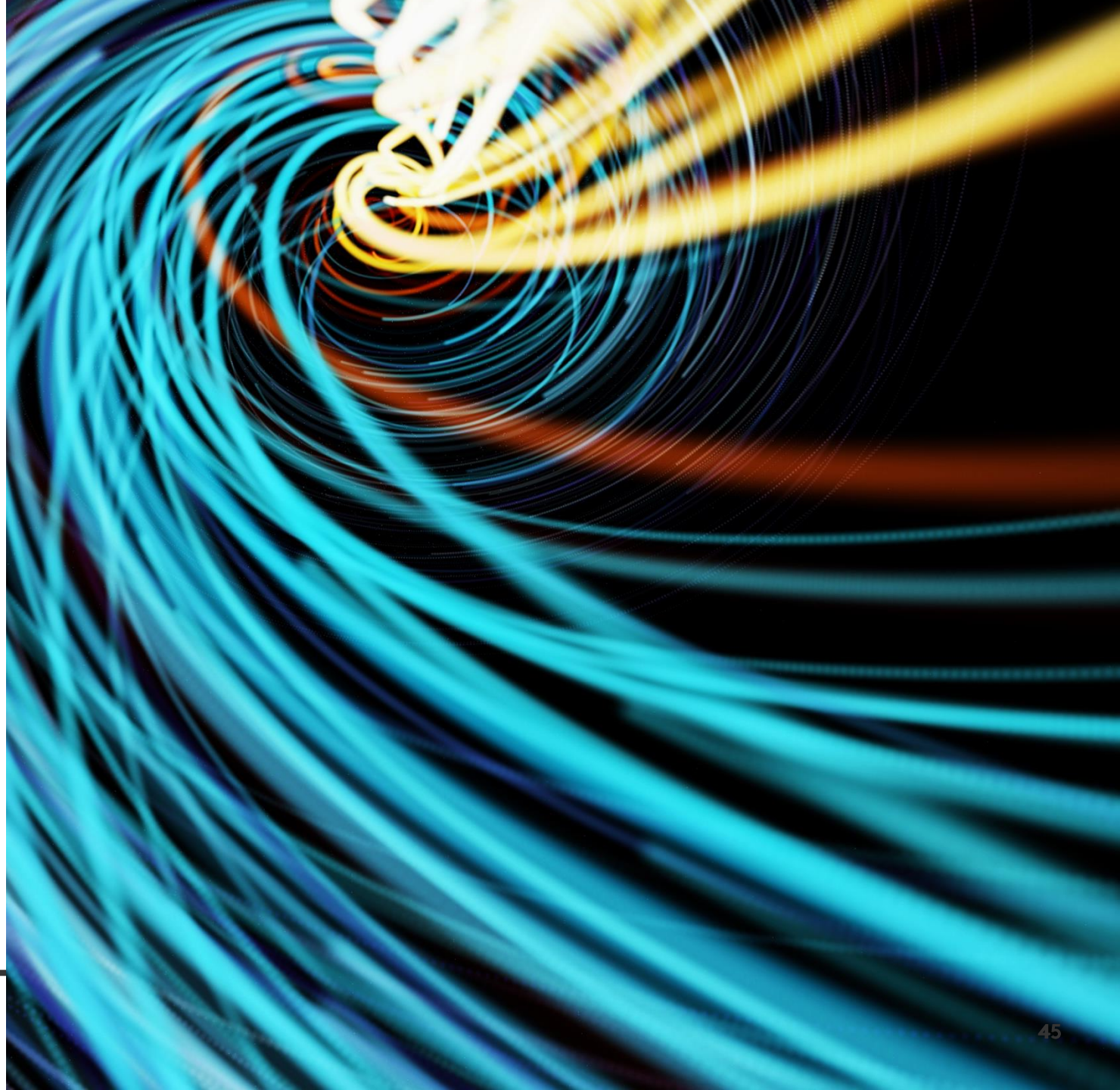
## About Kantar

Kantar is the world's leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth.

### Authors and Contributors

The scenarios were developed by members of Kantar's Futures Practice including Lloyd Burdett, Global Lead, Futures Practice, Don Abraham, Senior Partner; Chris Carbone, NA Futures Practice Lead; Charlie Warwick, EMEA Futures Practice Lead, Vicki Lai, APAC Futures Practice Lead, Wayne Pan, Associate Director; Shepherd Laughlin, Associate Director; Harry Sparkes, Consultant, Nicole Seredenko, Analyst; Doug Silverman, Graduate Intern. Design support was led by John Catlett, Kelley Zeller & Emmanuel Davis

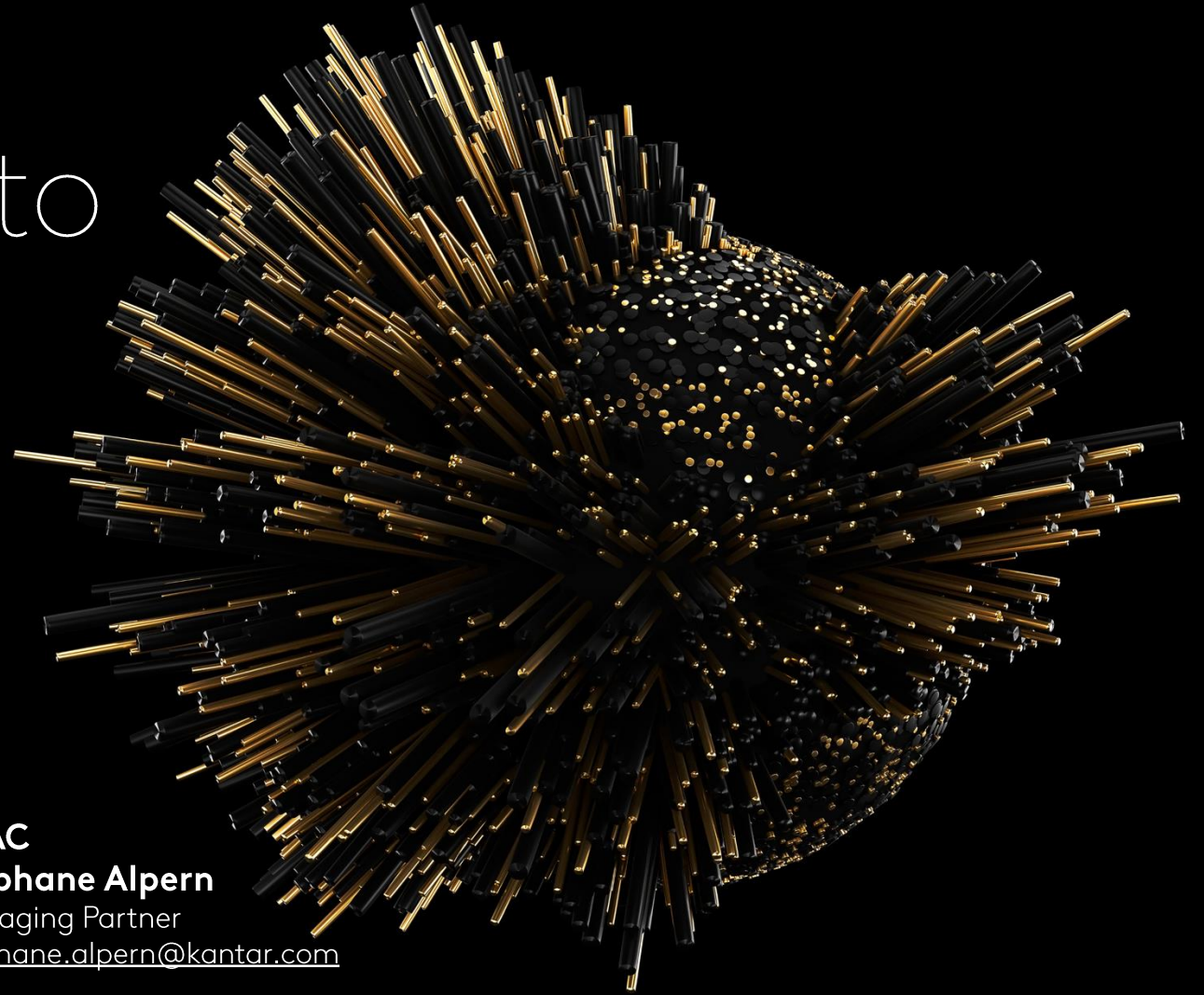
Our North American team has also developed an equivalent set of scenarios based on the North American context and outlook which can also be found on [Kantar.com](http://Kantar.com)





# KANTAR

We look forward to  
shaping your  
future together!



For a deeper look into how you should plan for these futures,  
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