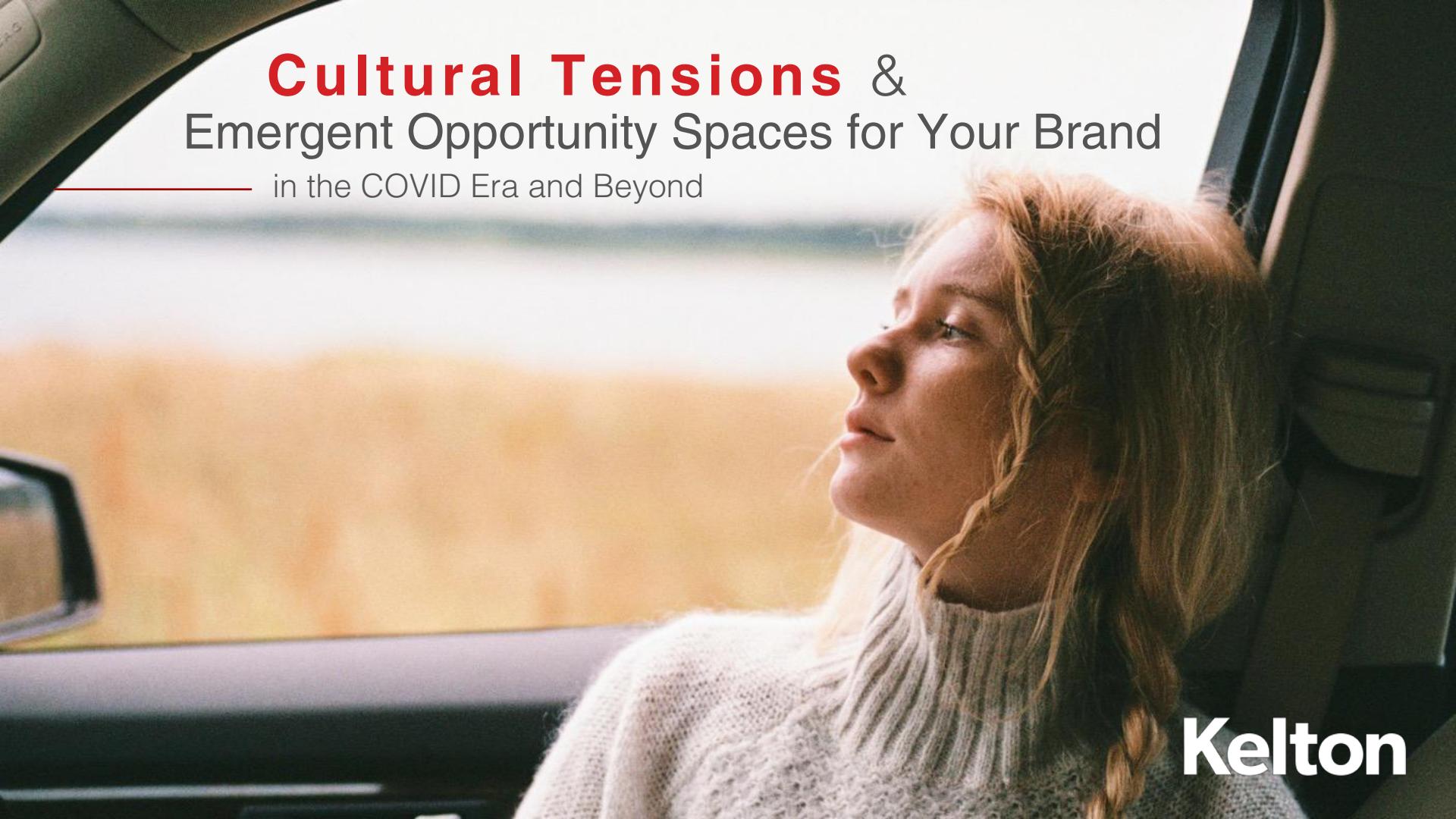


# Cultural Tensions & Emergent Opportunity Spaces for Your Brand

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in the COVID Era and Beyond



Kelton

# Navigating the New Normal — and Beyond

The tug we feel as we're pulled towards contradictory ideas and desires creates tension, but it also creates opportunity. The opportunity for newness — new experiences and new ways of thinking. At Kelton, we're constantly scanning the culture at large for these broader tensions that open opportunity spaces for forward-thinking brands to take action.

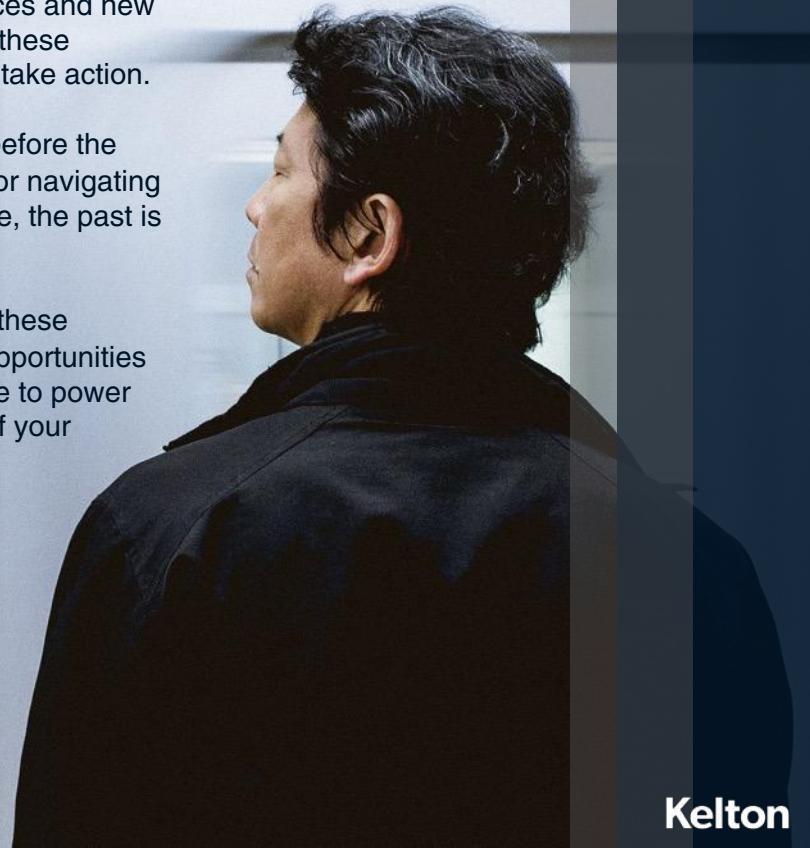
The tensions we'll present in the following pages played out in myriad ways before the [coronavirus pandemic](#), and we believe they'll provide a powerful framework for navigating the complicated weeks and months to come. After all, even in times of change, the past is a powerful indicator for how we'll continue to behave.

As your brand prepares for the new normal and beyond, consider what roles these cultural tensions might play in your strategy and execution. What emergent opportunities do they present for your category? How can you use the friction they generate to power innovation? And how can they help you meet the novel and evolving needs of your customers?



## About Kelton Global

Kelton Global is a consumer insights and brand strategy consultancy that helps businesses grow and thrive. They combine market research with creativity to help companies all over the world answer the question: what comes next?



At Kelton, we use these tensions and opportunity areas to guide the brands we work with in a couple of different ways:

- **Getting More from Consumer Insight** – We start by presenting key tensions to spark hypotheses about the brand, category, and consumers. Our Cultural Insights team then explores the most relevant themes that emerge, either at a high level via Trendscan, or in more depth via Cultural Context Analysis. Taking what we've learned about these themes, we move into primary consumer research, followed by a Sensemaking workshop and the presentation of our findings.
- **Mining Culture for Ideas** – We use tensions as a starting point for an Emergent Opportunity Analysis, where the goal is to delve into a specific category or demand space. This work feeds into a Rapid Ideation workshop designed to generate an array of sketch ideas. We can then turn these sketches into concepts, test them quantitatively, and ultimately prototype.

[Send us a message](#) if you want to learn more about how our process can help your brand unlock new potential.



# Pre-COVID Cultural Tensions

These tensions have existed since well before the COVID era

**Experience Economy**  
The desire for new experiences in the wider world

**Indulgence**  
Elevated tastes and preferences from a booming economy

**Reactive Health**  
A health mindset centered on treating sicknesses

**Centralized**  
Organizations and institutions that are centralized through physical locations

**Individualism**  
The freedoms and beliefs of the individual, including privacy as a priority

**Productivity**  
Maximizing time to achieve success and show your value to society

**Global**  
The benefits of an interconnected global society, both culturally and commercially

**Cocooning**  
The safety and security of being in your own home/space

**Practicality**  
The economic pragmatism encouraged by a looming recession

**Proactive Health**  
The active prevention of sickness by prioritizing proactive health solutions

**Distributed**  
Distributed spaces accessible only through key online platforms

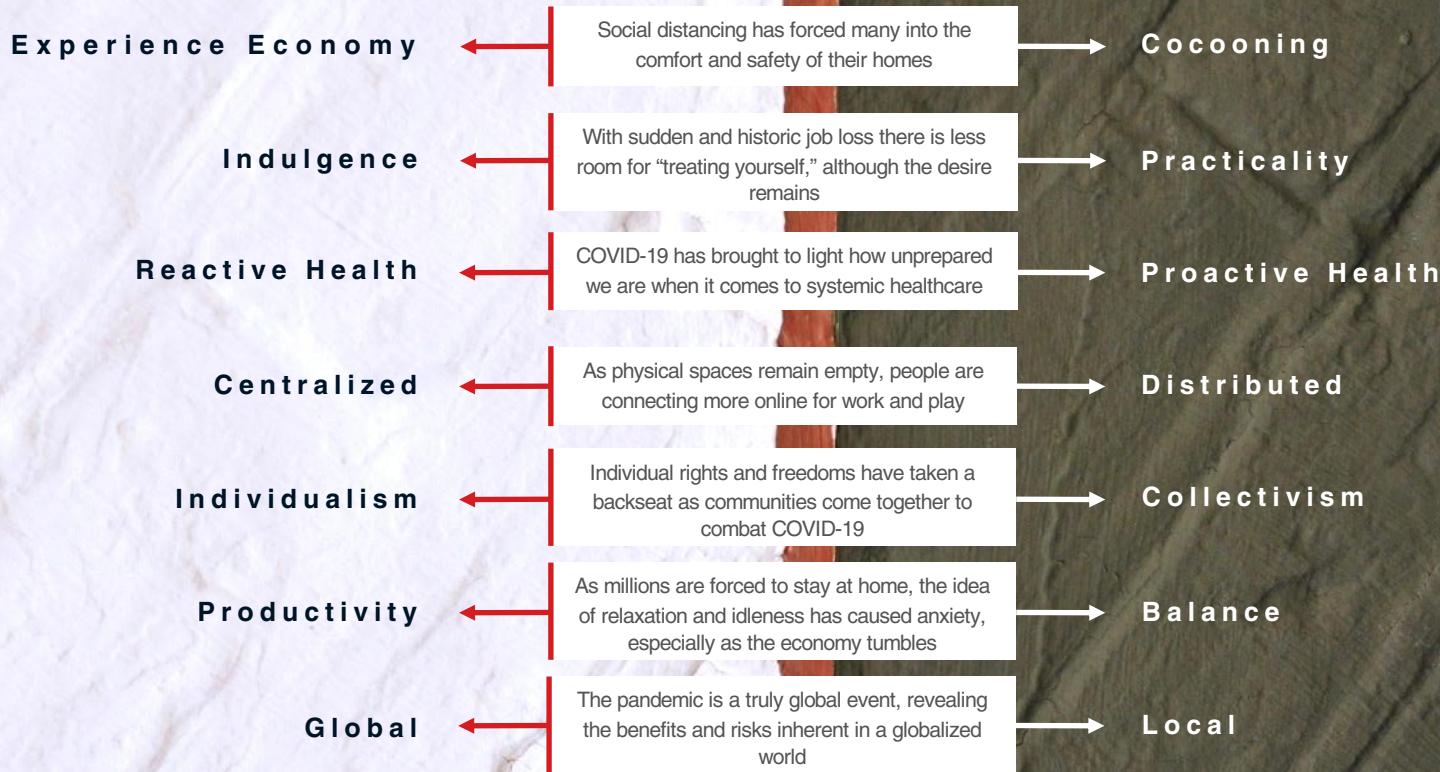
**Collectivism**  
The collective good supersedes individual beliefs and personal freedoms, especially in times of crisis

**Balance**  
Appreciating time and valuing mental/emotional wellbeing as much as material success

**Local**  
Prioritizing issues and focusing resources on regional communities, often by adopting an anti-global stance

# Cultural Tensions in the COVID Era

In these times of extreme volatility, they help us make sense of the changes we're seeing





Experience Economy



Cocooning

Social distancing has forced many into the comfort and safety of their homes, looking for new sources of entertainment that bring the wider world to them.

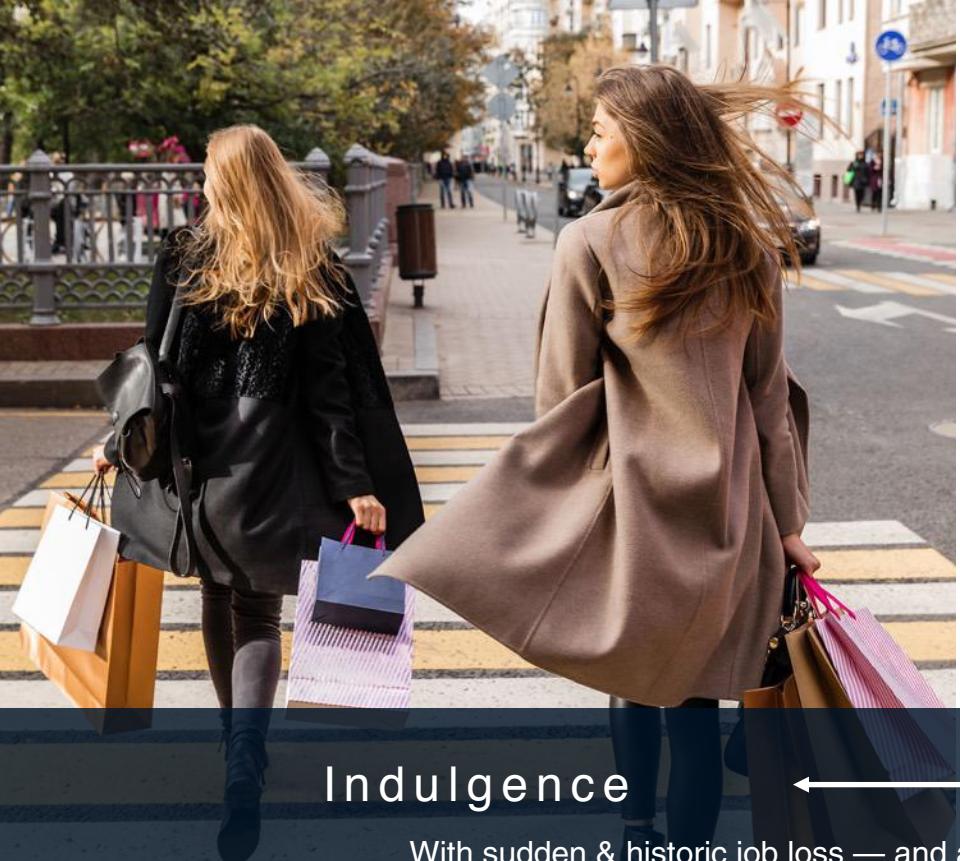


# Brand Opportunities

Even the complete re-opening of states won't signal a truly post-COVID world. Until the virus is under control, brands must work around new anxieties and make the most of their digital resources.

- **EXCLUSIVE GATHERINGS** – Once restrictions are lifted, brands (in the entertainment and travel sectors especially) will have to balance consumers' desire to be out and about with the potential fear around mass gatherings. *Can brands get ahead of this and offer experiences that bridge the two with smaller, more exclusive gatherings?*
- **QUALITY TIME** – Lately the social media space has become inundated with imagery of people isolating with loved ones as the silver lining amidst the crisis. *Can you use this tailwind to reinforce the value of these relationships after the crisis subsides?*
- **NEW DIGITAL ENTERTAINMENT** – The benefits of digital technology are highlighted during the shutdown, and new rituals have arisen as part of social distancing. *How can you leverage some of these new forms of entertainment, like tele-socializing or immersive gaming?*





Indulgence



Practicality

With sudden & historic job loss — and a long road to economic recovery seeming likely — there is less room for “treating yourself,” although the desire remains.



# Brand Opportunities

In the months to come, consumers will need help juggling pragmatism and the desires for distraction, indulgence, comfort, pampering, and escape.

- **SMALL LUXURIES** – Small routines or rituals are being championed as having a strong emotional effect. *How can you amp up the pleasure or experience to create small moments of oasis, with equally small price tags?*
- **INDULGING AT HOME** – Thanks to social distancing, consumers are craving the old indulgences of the outside world but don't have many substitutes. *What economical experiences or products can you offer that allow consumers to replicate the satisfaction of outside experiences in their home?*
- **SELECTIVELY HIGH-END** – Economic instability has led consumers to focus more closely on how they spend their money, especially when it comes to non-essentials. *How can you offer deeper emotional meaning to satisfy pragmatic consumers?*
- **PREMIUM PERFORMANCE** – With pragmatism top of mind, and shopping taking more time and effort, quality and durability are especially valuable. *How can your brand messaging focus on the practical benefits of high-quality products, without crossing into "luxury" territory?*



## Reactive Health



## Proactive Health

COVID-19 has brought to light how unprepared we are when it comes to systemic healthcare, and consumers are responding by taking matters into their own hands.



# Brand Opportunities

Holistic overall wellness trends based in physical, mental, and spiritual health became more relevant than ever during the height of the pandemic, and will continue to be important as people grapple with the lingering effects of coronavirus.

- **WELLNESS TOOLKITS** – Workouts have gone from gyms to living rooms, while many medical appointments have transitioned from office to online. *How can brands help consumers tailor DIY wellness solutions that fit their lifestyle as the new normal takes shape?*
- **RISE OF IMMUNITY** – Proactive health and wellness has been growing in popularity for some time, but COVID-19 has pushed immunity health into overdrive, as consumers look to an increasing range of resources to stay healthy amidst the pandemic. *How can the growth of interest in holistic wellness, self-care, and self-pampering drive messaging and innovation around immunity health?*
- **HEALTHY DISTRACTIONS** – Social distancing has made the danger of loneliness and anxiety more acute than ever, changing the way we view video games and other indulgences: from mindless to healthy distraction. *What other activities, products, and/or services might also be in this emerging category of healthy distractions?*





Centralized



Distributed

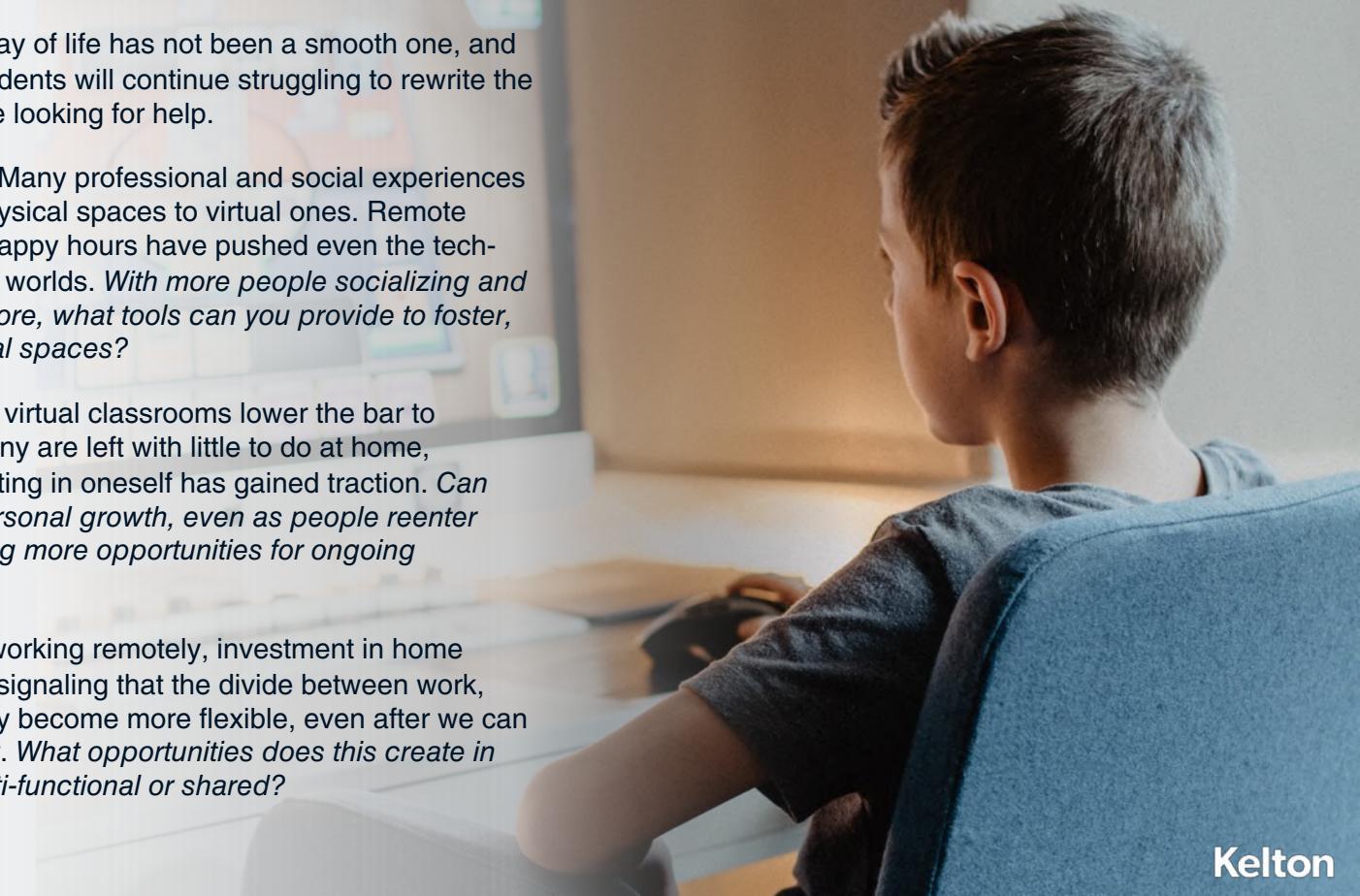
As many physical spaces remain completely or partially empty, people are connecting more online for work and play, speeding up the transition of offices, schools, and other institutions from IRL to digitally distributed.



# Brand Opportunities

The transition to a distributed way of life has not been a smooth one, and institutions, employees, and students will continue struggling to rewrite the rules. Understandably, they'll be looking for help.

- **VIRTUAL REAL ESTATE** – Many professional and social experiences have been relocated from physical spaces to virtual ones. Remote offices, schools, and Zoom happy hours have pushed even the tech-averse to explore new virtual worlds. *With more people socializing and working online than ever before, what tools can you provide to foster, streamline, and secure digital spaces?*
- **PERSONAL GROWTH** – As virtual classrooms lower the bar to continuing education and many are left with little to do at home, learning new skills and investing in oneself has gained traction. *Can you lean into avenues for personal growth, even as people reenter shared spaces, by integrating more opportunities for ongoing learning?*
- **FLEX-LIVING** – With many working remotely, investment in home workspaces and has grown, signaling that the divide between work, home, and social spaces may become more flexible, even after we can be within 6 feet of each other. *What opportunities does this create in terms of making spaces multi-functional or shared?*





Individualism



Collectivism

Individual rights and freedoms have taken a backseat as  
communities come together to combat COVID-19.

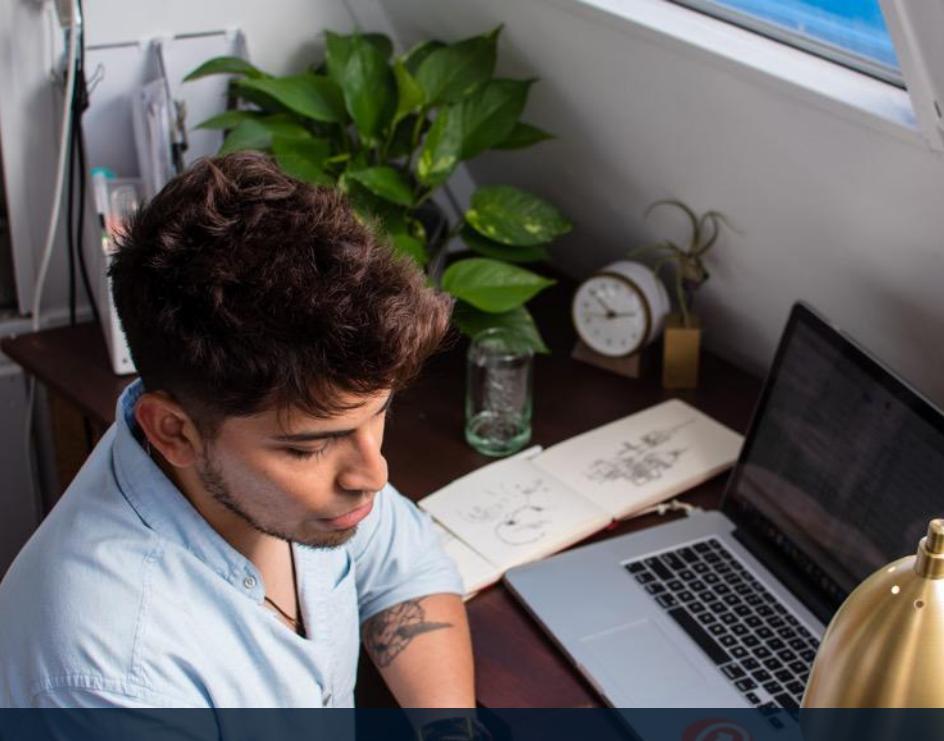


# Brand Opportunities

Consumers are looking for brands to prioritize purpose over profits and support their workers and the communities they serve over financial gains.

- **HEROIC COMPANIES** – Companies are stepping up in this time of crisis and shifting their production capabilities and personnel policies to meet current challenges. *Can companies get ahead of this now and establish themselves as (category) leaders for the future?*
- **ADOPTING WORKER-FRIENDLY POLICIES** – The front line of this crisis is made up of nurses/doctors, delivery people, and custodians. There is a movement to reconsider the value of this work after the crisis. *Can your brand help shift our definition of who a “key stakeholder” is, or bring these new icons to the fore in your communications?*
- **SMART SACRIFICE** – Social distancing has shown that people are willing to sacrifice for the greater good when there is clear evidence backing up the urgency and seriousness. *Can this be applied to climate crisis, water scarcity, and other “black swan” issues?*





## Productivity



## Balance

As millions are forced to stay at home, the idea of relaxation and idleness has caused anxiety, especially as the economy tumbles.



# Brand Opportunities

Facing a recession that's likely to last, people are feeling the pressure to perform at their best — and they're looking for ways to combat this stress in order to avoid burnout and mental fatigue.

- **RE-EVALUATING TIME** – The stay-at-home order has been referred to as a “Pause” (in NYC), indicating a new way to think about the hustle and bustle of daily life. *Can your brand meld the best of “on-demand” with the best of “slowing down”?*
- **RECONNECTING WITH PASSIONS** – People are re-discovering hobbies that help them destress and pass the time. *Can you encourage people to pursue these life-improving hobbies, especially lifestyle brands that provide key services?*
- **MINDFULNESS AS A WAY OF LIFE** – This is a traumatizing experience for many, and mental health techniques are likely to remain more widely utilized even after we adapt to the new normal. *How can you incorporate mindfulness tools and messaging into offerings to help create a sense of stability and brand trust in consumers?*





Global



Local

The pandemic is a truly global event, revealing the benefits and risks inherent in a globalized world.



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# Brand Opportunities

Despite the global scale of the coronavirus outbreak, consumers' worlds have gotten smaller, both elevating the importance of local communities and highlighting their struggles. This is something larger brands must take into account.

- **GLO-CAL** – As global supply chains are interrupted and communities struggle to keep local businesses alive, buying locally sourced and sold products is becoming an act of support.  
*How can brands support local communities during this time?*
- **MICRO-SUPPLY CHAINS** – With global supply chains called into question, consumers are seeing more pragmatic reasons to purchase locally-sourced goods. *How can brands emphasize local supply chains, or simplify supply chains to foster consumer trust?*
- **SMALL BUSINESS REVIVAL** – Small businesses have increasingly reached out to each other, to customers, and to the community to help retain employees and adapt to a new reality.  
*Can brands partner with local makers or small businesses to create lifelines in a time of need and cultivate better relationships with consumers?*



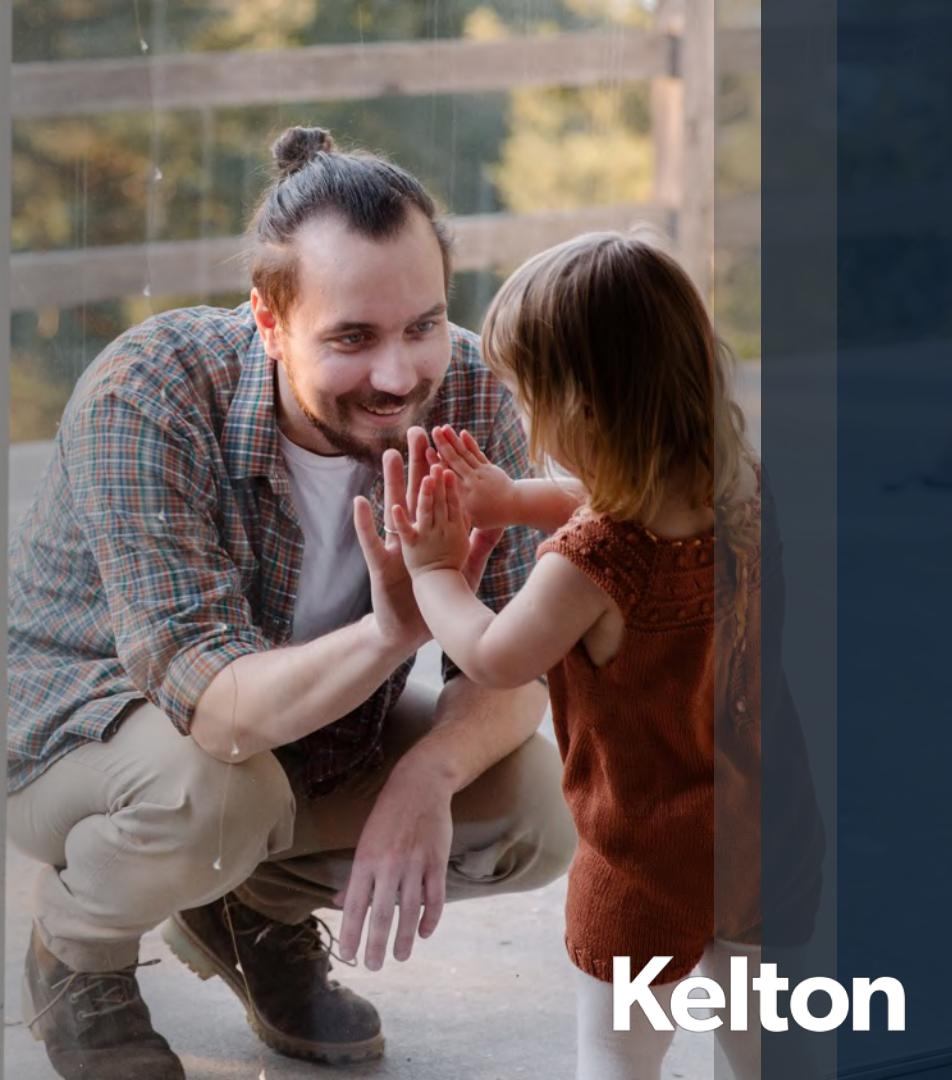
Curious to learn more about how these cultural tensions can help inform your strategy and drive innovation in the months to come?

**Get in touch. We're here to help.**

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