

A NewReality series by
more than **One**[™]

The Summer of Observations

THE JULY-AUGUST EDITION 2020

Our first edition of Observations was made during lockdown. Nothing is certain, and no one knows how recovery will continue to play out.

Here are some ideas and observations around three core themes:

- 1. Keys to recovery**
- 2. Readiness mindset**
- 3. Present-tomorrow themes**

Welcome to **The Summer of Observations**, our **NewReality** series - where we find what's going on. But you decide what's next.

ONE

The keys to recovery

Safety, social support
and improvisation.

Have you tried turning it off and on again?

“Before you embark on that big change, put the garbage out first”, argues Joris Mateusen, Owner and Head Strategist at Absoluut.

We all know this first rescue solution when your computer, wifi station, or any device with a chip in it gets the gremlins. You turn it off. You turn it on. And it works again. *Magic?* No magic. It clears the system of all sorts of ghost files and subroutines that just eat energy, memory and space instead of doing something. Garbage goes out.

Organizations are no different. So many resemble the "Keep out!"-bedroom of a 15 year old boy. It smells, but you can still live in it, so you do. And after a while, you grow accustomed to the stink and dirt.

Company stink and dirt is all the slack, all the unnecessary formalities and procedures, every additional rule or every new exception, the redundant meetings, the time consuming habits, all this noise created in the years of doing business. And dare I say it: the tedious task of reporting financials to your network bosses. (Pro tip: go indy!) Face it: you know what belongs in the bin. You just grew accustomed or blind to it. Think of COVID-19 as your mum bursting into that room and shouting: clean this NOW!

We've all been turned on and off again. And yet, seems like nobody is taking the garbage out. Everybody is talking about how to fundamentally rethink, redesign, change etc. Predictably, it's turned into a competition. "We will change harder better faster stronger than you!"

There are currently two schools of thought in the corona ring, dominating the "and now what?" discussion. Left corner: *"Nothing will ever be the same"*. Right corner: *"Nothing really changes"*. Picked a corner? No? Smart. Because you are right, but on another level.

Human nature doesn't change. Think of it as the current in the oceans. If it does change, it's mightily slow to do so. *But have you seen the waves lately?* Crazy shit.

"Surf's up, dude. Go now or stay beached forever."

"Oh my sweet surfer child. If you'd only knew about the deeper drive of the current."

Waves get you ahead quickly, currents will help you understand and predict outcomes. You need to manage 'both directions at once'. (If you smell a whiff of "fast and slow" or "the long and short of it" in here: you are right. But also "Il Gattopardo". I can go on about this. I won't.)

It's an amusing debate. Pick a thought or two for later. But this noisy discussion obfuscates a basic opportunity. You guessed it: *take the garbage out*. Being on garbage duty is no fun and it's not sexy. But it's the simplest and most important thing you can do now. It will help you straight way and in the long game.

Bonus: your place might smell nicer.

The East has largely been looking at public health measures as a vehicle, or a gateway, to opening the country, **not as the obstacle in the way, but as the gateway to economic recovery.**



Psychological safety also plays a big part in restoring confidence: *"It's not that we feel safer now, but we do feel much more comfort in going out with the slower pace" of new infections.*"



Wildly popular coronavirus-tracker app helps South Koreans steer clear of outbreak areas

Published: March 18, 2020 at 9:38 a.m. ET

By Jurica Dujnovic

Also, Apple and Alphabet make changes to apps to prevent misinformation



Political-cultural differences and (in)effective leadership also vary in responses and outcomes from country to country to regions.

In May, June, the U.S., switched quickly to a familiar strategy in public health: **harm reduction instead of elimination.**

'We need to live with it': White House readies new message for the nation on coronavirus

The effort to craft a clearer response comes after months of Trump downplaying the health crisis and mixed signals from the administration.

But the U.S., which accounts for less than 5% of the world population, leads all other countries in global coronavirus infections and deaths.



HEALTH AND SCIENCE

The U.S. has the worst coronavirus outbreak in the world: 'The numbers don't lie,' Dr. Fauci says

PUBLISHED WED, AUG 5 2020 1:48 PM EDT UPDATED 45 MIN AGO



NEWS ▾

SHOWS ▾

• LIVE ▾



Fauci: "We could start talking about real normality again" with a vaccine in 2021

It's a gradual and evolving process...

TWO

Readiness mindsets

Shifting
Diversifying
Focusing
Reinventing

So far, Covid-19 has proven to be the biggest disruptor of disruption.

Having a readiness or *“in the moment”* mindset means when the market is ready, we will be ready.

SHIFTING

Attitudes

Most people still crave for what they know as "normalcy" to get on with their lives - but at the same time increasingly recognise that "normalcy" may change.

Work and life are merging even more.

The WSJ reports that **more companies now envision a hybrid future**, with more time spent working remote, yet with opportunities to regularly convene teams.



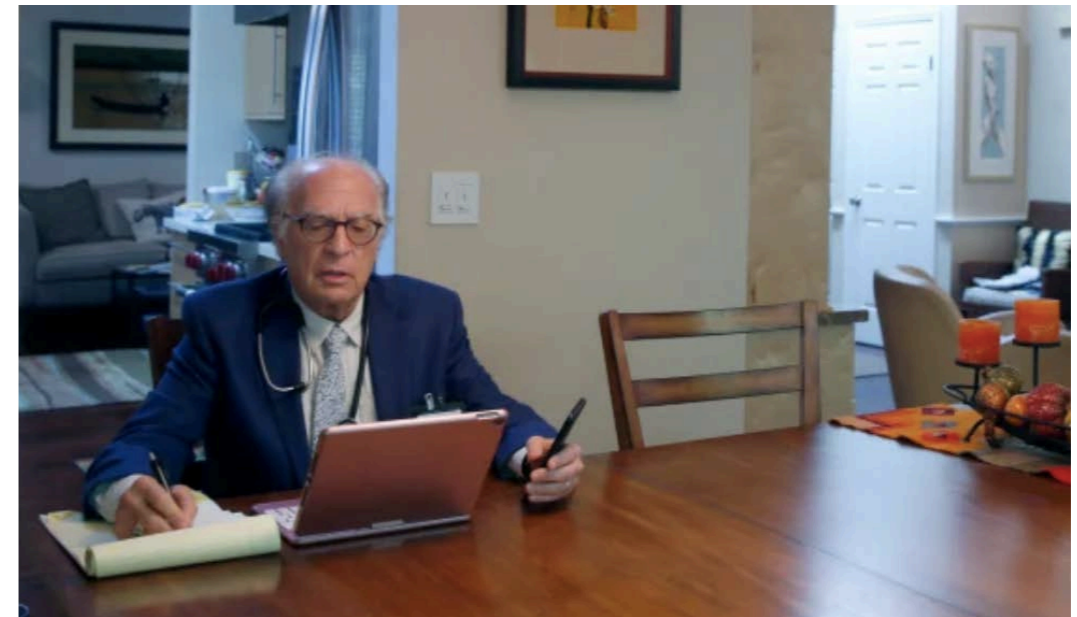
This change in work and lifestyle will even change our mode of mobility. The Mercedes-Benz V-Class currently the most searched for people mover as most practical for carrying the entire family.

Preferences

We are led by our perceptions of safety and reassessments of "the situation" in context.

Or, perhaps the best argument against the **telepresence revolution** is not only that people are creatures of habit but also that pandemics have historically done little to arrest the growth of cities and leisure. Face-to-face meetings might feel even more valuable in a post-pandemic world, restoring business travel with surprising speed.

But who knows?



Dr. Neil Handelman meets with a patient remotely during a telemedicine appointment. What consumers want has changed, but for how long?

SHIFTING

More Than 60 Colleges Hit With Lawsuits As Students Demand Tuition Refunds

Expectations

From remote learning, restaurants to travel, people still overwhelmingly crave for the on-ground and in-person experience.

Many students say education online is not the same value or quality as an in-person education. An isolated, virtual education has diminished value when compared to what students are used to.

“Part of the value in being an in-person college student is being able to build relationships that last forever with the students who are sitting around you.”

The virtual tradeoff?

- **Drexel's online classes is 40 percent less than traditional courses.**
- **But the college experience is “priceless”.**

It's worth mentioning that American universities are largely tuition driven. Elsewhere in the world it's much down to state support.

Professor Bruce Clark of Northeastern University elaborates: “We rely on a very specific set of activities occurring in a very specific sequence, with big consequences for financial health. Most institutions are tuition-driven and now must provide value in new ways to justify tuition. Some of this is bound up in the fact that universities charge for tuition and dorms, **but not the college experience - which is a large part of the total value that students receive in the college “bundle”.**

Or a different path?

However educators should be thinking like *Doug Garnett*, adjunct professor at Portland State University who said, **“I'm just focused on getting the learning across in a new way”.**

DIVERSIFIYING

Not all diversifications are equal. Those who want to survive might have been forced into diversifying.

But whether these diversification efforts will stick once "normalcy" resumes - is anyone's guess.



Radisson Hotel Group South Asia has created 20 signature dishes for home delivery.

India's luxury hotels are using their expertise in food, housekeeping and estate management to diversify revenue streams.

But hospitality is about emotions, cultures, and largely experiential, how will luxury hotel chains compete with abundant online food delivery chains?



Partnerships with table reservation and food discovery platforms have accelerated the trend.

The French government is rivalling Airbnb by building their own booking.com.

"Slow travel" and local journeys that reduce environmental impact with their European neighbours taps right into climate change.



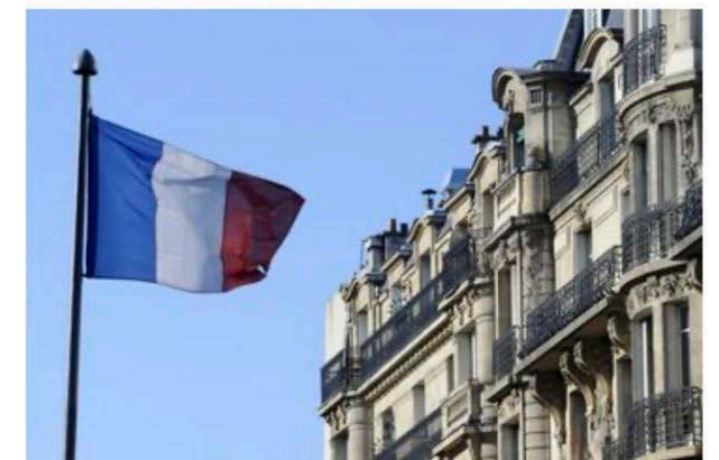
Technology

France to Build Online Platform to Rival Airbnb, Booking.com

By Francois De Beaupuy

May 14, 2020, 10:06 AM EDT

- ▶ Industry needs to regain ties with clients, Caisse head says
- ▶ French online tourism platform will take months to build



FOCUSING

Successful companies will likely focus on delivering core values in new ways.

And the fastest way in regaining focus is going back to our roots.

Is “travel as we know it” over?



Brian Chesky says: “travel and living are going to blend together. When we started Airbnb, our original tagline was, *“Travel like a human”*. And getting back to our roots back to basics - of belonging and connection.

“People don’t want to get on planes, they don’t want to cross borders, they don’t want to travel on business, they don’t really want to go to cities...What they want to do is get in a car and travel up to 300 miles...People want to get out of the house, they do want to travel...”

But according to Scott Keyes of Scott’s Cheap Flights as long travellers feel confident they’re not risking their life to get on board - the main thing that airlines can do to try to entice people back on planes is offering cheap prices, because they know that’s the main thing that people are (basing) a purchasing decision on.

This might also drive greater opportunities for airlines to further develop point-to-point network:

Air Belgium says they will “serving the market where it is located according to the customers” by opening up connections between more cities, without transiting through hubs, will shorten the passenger journey among other benefits.

REINVENTING

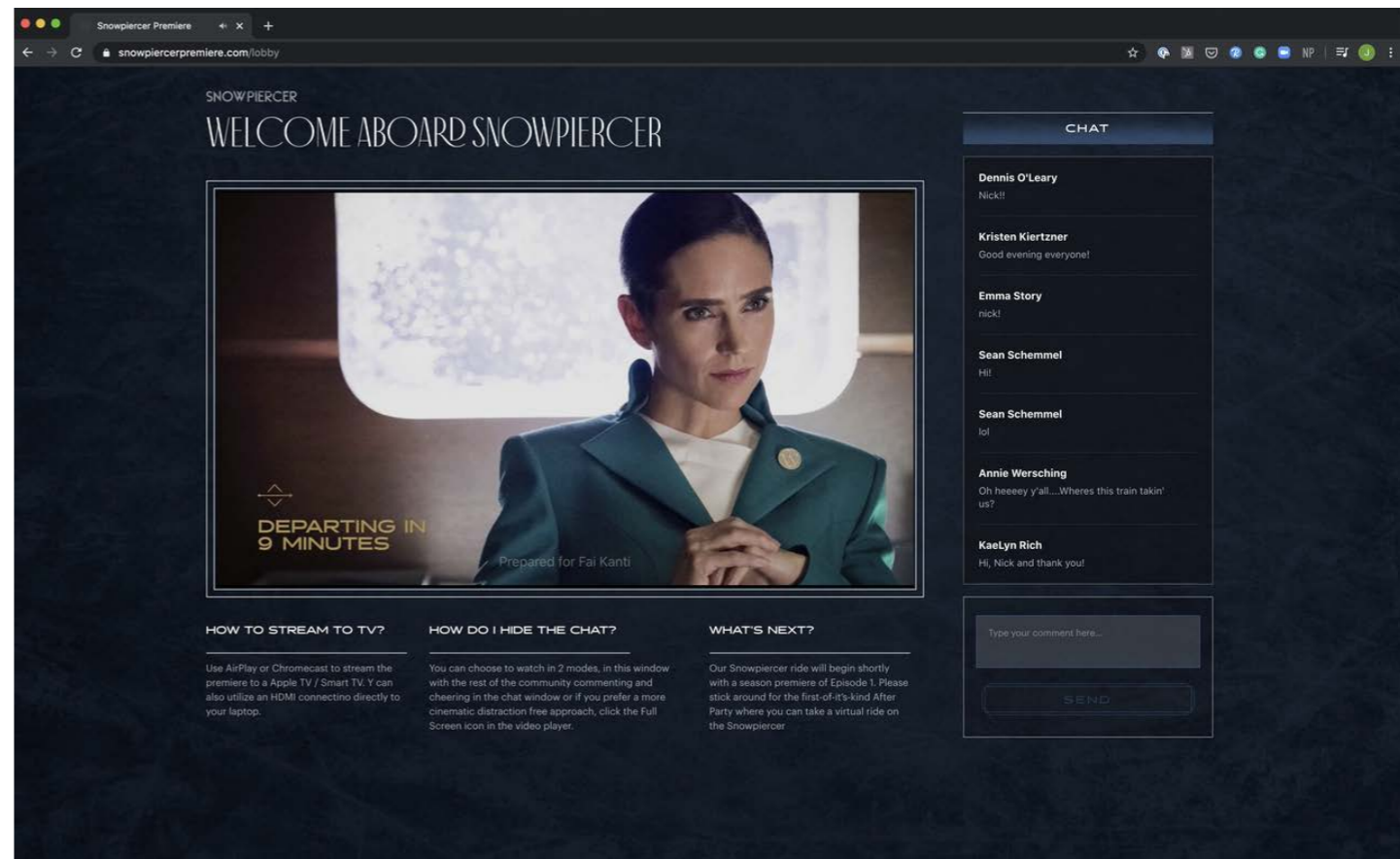
It was Yuval Noah Harari who said, *"in order to keep up with the world of 2050, you will need not merely to invent new ideas and products – you will above all need to reinvent yourself again and again."*

Jay Rinsky of Little Cinema is one such renaissance person.

A video DJ and artist born in New York, he founded Little Cinema - an immersive cinematic experience that combines film, theater, live music, and audience interaction. His ability to reinvent cinema is now Hollywood's virtual answer to entertainment.



Premieres with no red carpet but TNT's Snowpiercer was another kind of entertainment.



"While other people are building Zoom events, we're really focused on narrative, live human interaction and how do we get people at home to feel like they've been in this real-life experience," said Jay Rinsky of Little Cinema.

THREE

Present-tomorrow themes

Preparedness

Confidence

Affordability

Proximity

Connectedness

Experiences

Reshaping

Accessibility

Interactivity

Range

“What should I do?”

“How do I do it?”

“Where can it take me?”

The virus has not only created challenges, but also opportunities to productively adapt, act and evolve.

The making of our new reality is still about relevance and value.

May-June campaigns reflect the **lifestyle norms that have stuck.**

Social distancing.



Face masks.



Contactless.



Hygiene.

TOURISM, GOVERNMENTS

Preparedness, confidence

Whatever your product, service or place, we are still in preparation mode.

Though some destinations have taken the first steps toward reopening their cities to travellers, airports are trying to determine what the terminal of the future will look like. *What do we do to improve air circulation and reduce airborne pathogens? How do we make things as contactless as possible?*

Hub status may be critical for jobs and economic competitiveness, but Singapore's emphasis in the next few years will shift from improving public transport reliability to envisioning and realising a post-Covid-19 connectivity by land, sea and air.



Singapore Changi Airport regarded as one of the world's best - is splurging on touch-free tech (such as contactless check-in kiosks and cleaning robots) - now increasingly considered as an industry standard..

Certified 'Safe' signalling

In May, the World Travel & Tourism Council (WTTC) launched the world's first ever global safety and hygiene stamp to recognise safety travel protocols.

This will allow travellers to recognise governments and businesses worldwide which have **adopted health and hygiene global standardised protocols – so consumers can experience 'Safe Travels'**.

**We will find more clean, safe hotels.
They will be state of the art -
benefiting more trusted brands.**



How we're helping travelers

Our COVID-19 Travel Safe tools help you find, filter for, and validate health and safety information, so you can feel more confident with your choices, whether you're planning a trip across town or around the world. Here's what to expect:

Health & safety checklists

Hotel owners can share safety measures directly on their Tripadvisor listing: sanitation procedures, mask wearing guidelines, social distancing policies, and more.

Search filter

A new filter allows you to easily find which hotels are taking these added safety precautions.

Traveler reviews

We've added prompts to the review submission form so you can validate safety measures and share your experiences with other travelers.

Q&A with business owners

If you still have questions, you can directly message business owners about their safety measures (or anything else).



Mandatory face masks



Hand sanitizer available to guests and staff



Staff required to regularly wash hands



Floors marked for social distancing



Regularly sanitized high traffic areas



Linens disinfected between guests



The recurring theme of human touch is near impossible to replicate, but at the same time, no one wants to touch anything unnecessary right now.

The Ultimate **Biometric Solution** for Fitness Clubs

ZKTeco

- ✓ **FACEDEPOT 7A** with **tripod turnstile** installation for Access Control
- ✓ **FACEKIOSK V43** Built-in **rewards** programs, analytics & real-time promotions

www.zkteco.co.za | sales@zkteco.co.za | sales@zkteco.co.za

The advertisement features an illustration of a fitness club interior with people using various equipment and a reception desk. A circular inset shows a person using a biometric device at a desk.

As the virus keeps spreading, many companies that make hands-free devices and products are seeing an increase in inquiries and demand.

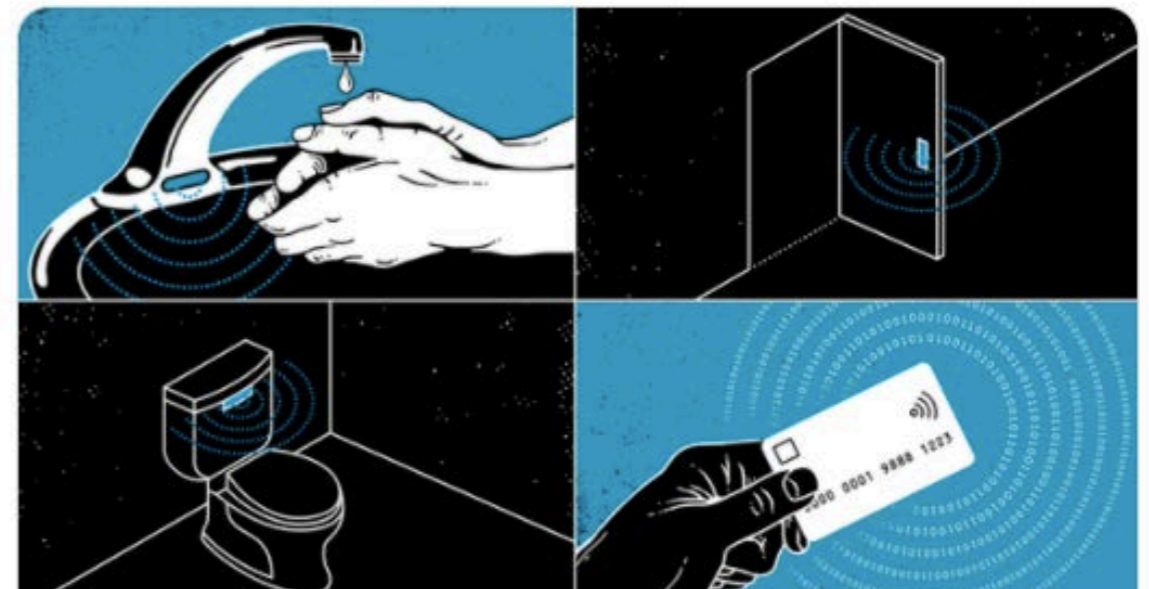
Everything from tapping a store's payment system to flushing a toilet is giving way to a whole new range of “touchless” necessities, not just solutions.

 Katherine Prescott
@kbprescott



"Kohler is reporting a surge in sales of touchless faucets and toilets to residential customers" -- intelligent toilet sales up 8x YoY!

Demand for touchless technology likely here to stay. Another factor pushing users toward more #VoiceFirst use cases?



Coronavirus Spurs Demand for Touchless Technology

Until recently, many people didn't think twice about signing their name on a store payment screen at checkout, or touching a door handle on ...

theinformation.com

Affordability, proximity, experiences

TOURISM, TRAVEL SOLUTIONS

Just less than 2 months ago, NY Times said that hotels have the edge over Airbnb due to standardised cleaning protocols.



UK's Culture Secretary Oliver Dowden said; “Self-contained accommodation has a lower risk than other areas.” Doctors also agree “that staying in a private Airbnb, especially one that allows no-contact check-in, such as through a lockbox, is the safer option now, of fewer person-to-person encounters.”

But recent figures show Airbnb's record-breaking 1 million bookings since 3 March. Airbnb said it was partly due to pent-up demand, with **affordable and closer destinations** making up for the bulk.

OREGON RIVER

Raft and Camping Trip

It was nearly summer. I was tired of the walls of my house. Pretty sure the walls were tired of me. In the carport the big blue river raft wore the look of a dog that waits too long by the door. Enough. I texted my old friend Tim, a travel writer sidelined by the pandemic. His walls, as it turned out, were tired of him, too.

But where to go? There was one answer. Away. Away from the relentless bad news. Away from the unceasing grief. Away from the fear of the unmasked masses. Into the pines, and onto the water. Back to “the rock-bottom facts of ax and wood and fire and frying pans,” as John Graves wrote in “Goodbye to a River,” my forever vote for the best book about rivers, and life on rivers.

But as other players come into online travel — Google, in particular, with a big share of search traffic — where can online travel stand out?

Steve Kaufer of Tripadvisor coins the ‘**considered trip,**’ the long weekend or week where you’re taking somebody who says “**they’re interested in explore location X. We piece it all together: the hotel, the experiences, the dining, and the shopping.**”

Expedia Group said the fact that tourists are currently visiting less-visited destinations, often within driving distance, means **search engines will build up this content, and enable Expedia to market them for the first time.**

UK’s Parkdean Resorts promote “Sandtones” of distinct destinations.



While Iceland gets our frustrations.

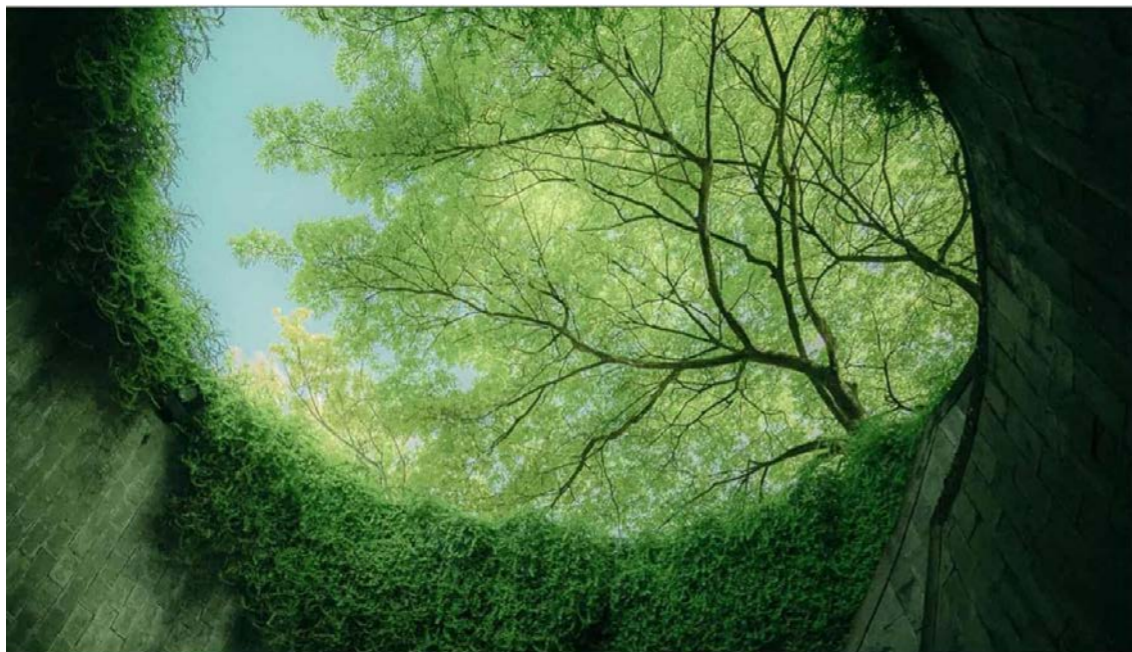
Although most countries are only promoting domestic travel, they might do well to prepare for international or luxury travellers.

Singapore works on a short...

Realistic that the new domestic campaign would not be able to plug the gap left by international visitors but “buy as much time as possible to help businesses survive”.

And long term strategy

Spend “a little less on conventional international travel marketing” but will continue to ensure that Singapore maintains high “brand equity” and a strong brand image in key markets.



Champenois of Belmond thinks that luxury travellers will take:

- Trips less frequently
- but will stay in destinations longer.
- The trip, or experiences, have to be worth it

In Japan, COVID offers ryokans an opportunity to get back to traditional roots...and unique experiences.



“Ryokans have had a hard time keeping their traditional operations with COVID-19, this style is actually the only solution for us to survive. In recent years, people are looking for a different type of operation... It’s time to rethink how we welcome back domestic travellers to a traditional way of hospitality,” said Aya Aso of SAVVY Collective.

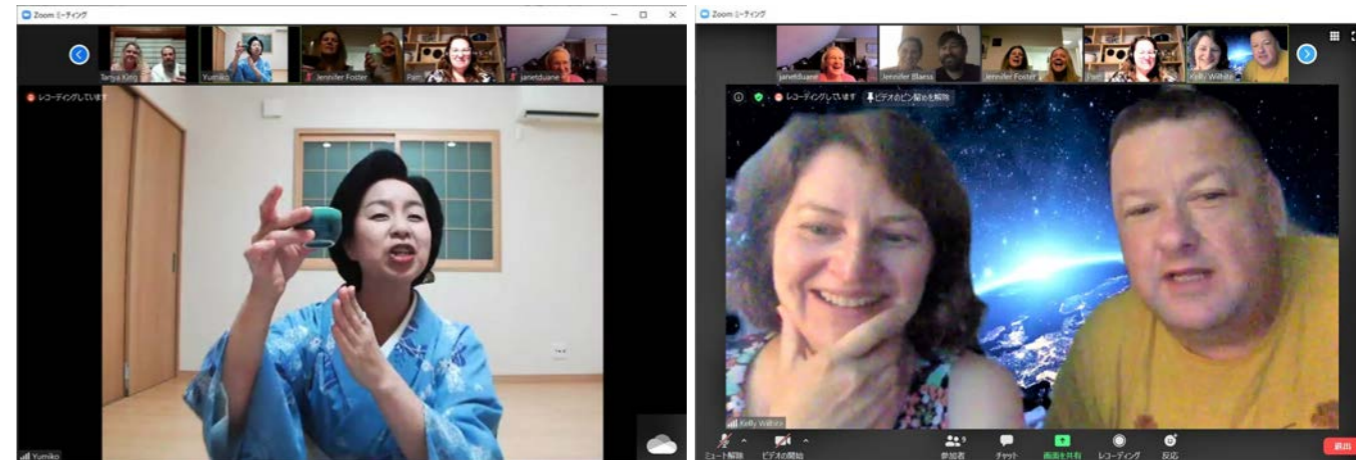
Reshaping, connectedness, experiences

ENTERTAINMENT, TRAVEL, CULTURE

People want to extend living experiences through better connection.

Online experiences could be as big as offline ones. It might take a lot longer but that's because it's a relatively new and bigger idea.

That's why companies that connect people, and have people generate content can and have become incredibly valuable.



From all sectors, we're going to see is a whole new era of entertainment and ways of interaction.



But celebrities on Zoom calls don't make a virtual event.

Virtual attendees say that online-only events have lowered the barriers to entry. Now that we can connect and consume content digitally, and people are far more selective about what's worth their time...and money.

Vogue valiantly live-streamed “A moment with the Met” in May.

Rosh Singh agreed: “What’s the benefit of staying up to watch live when there’s no interactivity? To truly bring this event to the masses, the masses needed to shape the experience.”



Could live events become more like TV shows? Or should it be another medium?



Hermés debuted its latest menswear collection via a serenely elegant video on its [website](#). That’s just one of the reasons why it felt like a successful alternative to a traditional runway presentation: it captured some of the energy that one feels sitting in a darkened venue, watching models whizzing past each other, crooning one’s neck in anticipation of what look will turn the corner next.

Some 11.8 million people have viewed the series since the MET began offering free streams of past performances in March and **it helped generate 30,000 new donors.**



The Metropolitan Opera is now diving into the pay-per-view market for just US\$20 per ticket.

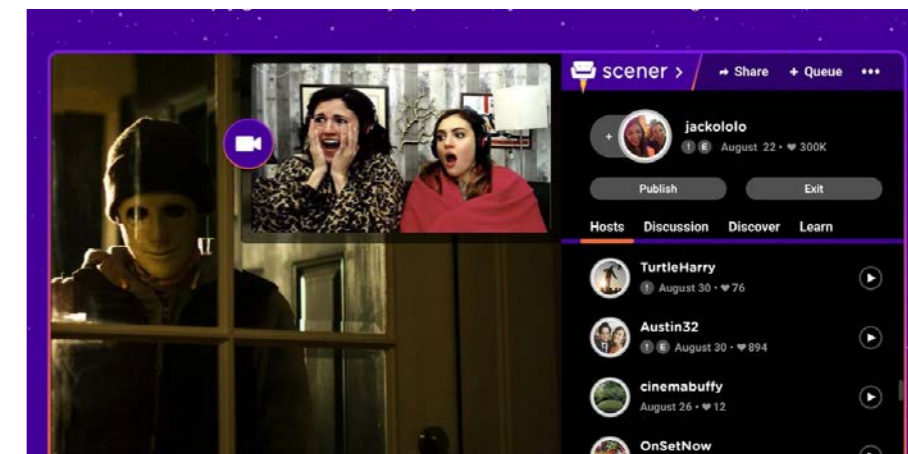


Catch a movie with your friends?

Scener, a browser extension that allows users to co-watch Netflix — has reinvented its product as a virtual movie theater experience where up to 20 viewers can watch together over video, audio or text chat in a dedicated sidebar.

Or train with an Olympian?

When the Airbnb team pulled their in-person Experiences together online via Zoom, it wasn't meant to be a long-term offering—but it's turned out to be one of the best-reviewed products.



In the future, Scener plans to roll out a “1-to-many” experience, similar to an Instagram Live, but synced to the underlying subscription video content service.

Reshaping, accessibility

E-COMMERCE, TECH, ADVERTISING

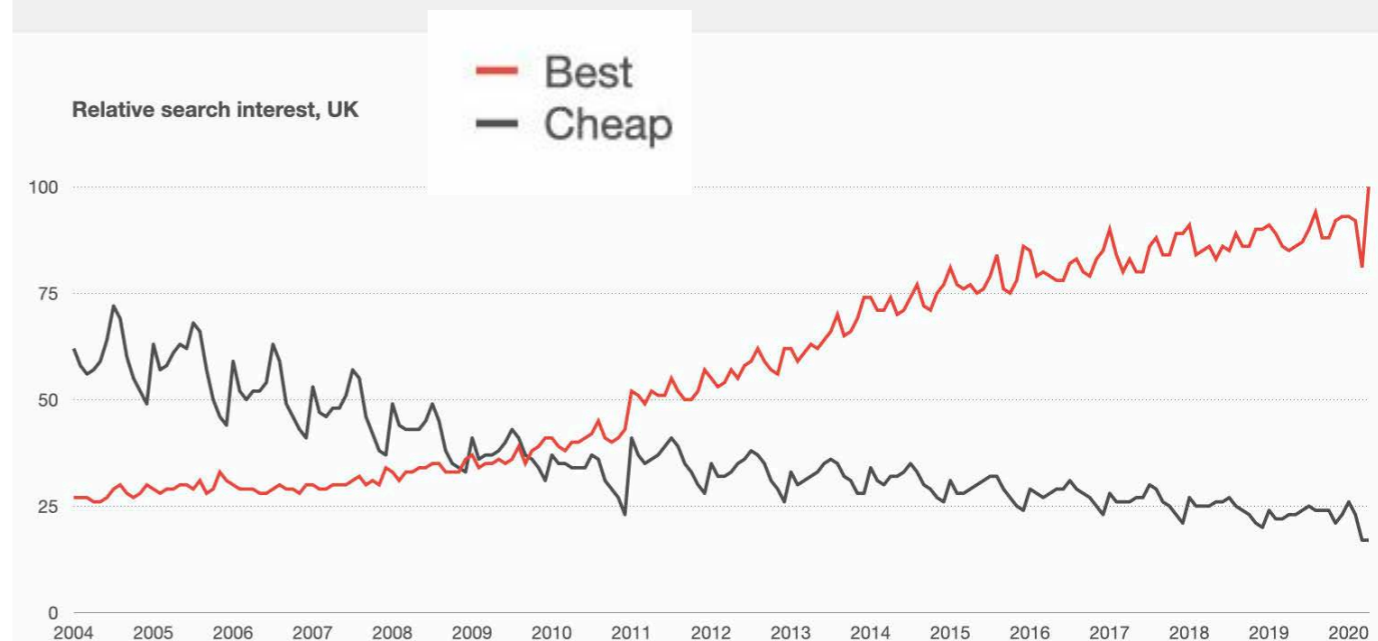
Online grocery sales tripled year over year, and worldwide streaming video hours doubled.

While rival brick-and-mortar retailers have had to shut stores during government-imposed lockdowns, Amazon posted its biggest profit ever at the height of the pandemic in the U.S. Revenue jumped 40% from a year earlier to \$88.9 billion.

But lots of important new things remain to be done in e-commerce.

From value to expertise

The internet has moved up the funnel from price comparison to recommendation and expertise



Source: Google Trends

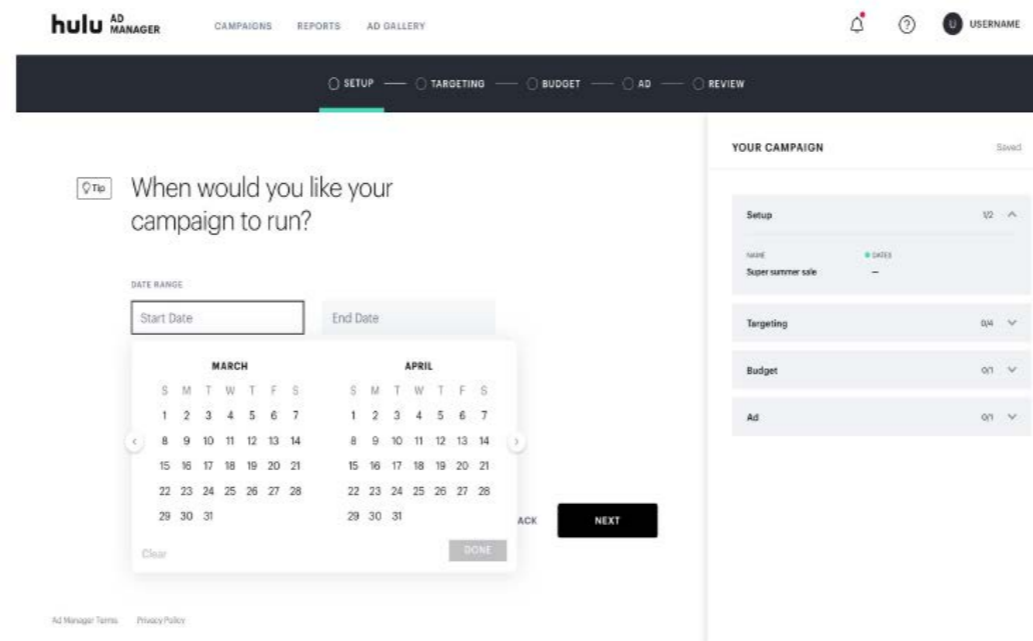
Benedict Evans — June 2020

91

Benedict Evans highlighted a recent observation from Google Trends (data should be taken with a pinch of salt) - of the internet moving up from utility price comparison to recommendation and authority.

Major online advertising platforms like Google and Facebook have allowed small businesses to buy directly for years.

\$60bn of consumer spending went through Shopify last year - it's safe to assume those vendors spent money on advertising, but how many of them would have bought an ad in a local newspaper?



Hulu is the second major company to launch a self-serve ads platform this month: TikTok officially opened up a self-serve ad platform that lets companies buy and manage ad campaigns directly.

Facebook Shops simplify online selling.

Facebook's "Global State of Small Business Report" found that in some countries, 50% had to close. Tourism and event-related businesses were hit the hardest as 54% of tourism agencies and 47% of hospitality and event small businesses reported near total closures. It also exposed a gender disparity. **Female-led businesses are more likely to be closed compared to male-led ones.**

Facebook @Facebook · 5h
Today we're introducing Facebook Shops, which will make it easy for businesses to set up a single online store on both @facebookapp and @instagram, and soon @messenger and @WhatsApp too



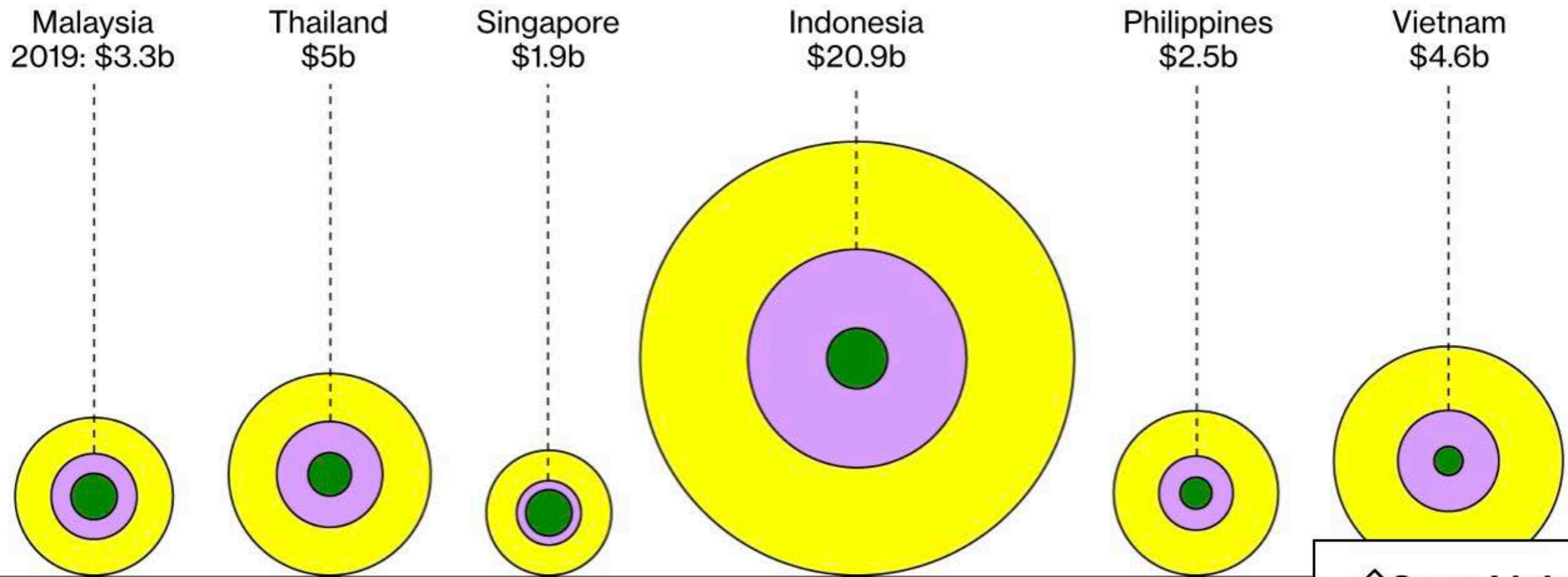
In most developed countries, 90% of the adult population is online.

“So many people are struggling to find a way to make a living.” Without tourists, South East Asia’s vendors turn to Facebook.

Much of the online activity in Thailand is “conversational commerce,” the sort of buying and selling that takes place over chatrooms, messaging services such as WhatsApp, or platforms such as Instagram.

It can be particularly useful for micro-retailers, allowing them to connect quickly and directly with consumers and to offer personalised service, with little to no upfront investment.

■ 2015 ■ 2019 ■ 2025, projected



◀ Lower projected growth, 2019-2025

Higher p

 **Copy Link**

MEDIA, TECH, TALENT

Interactivity, range

Welcome to the age of range...

Imagine a New York Times where you get your music and play digital games, along with your news? That vision is a big part of what Meredith Kopit Levien, announced as the company's new CEO, sees as the future of the company.



Vox's strategy is just to be well diversified.

"We're trying to avoid the seesaw. When the ad market is strong, companies look for ways to make more things free and more accessible, and when it's weaker, they put more things behind walls and focus on that," said Jim Bankoff, CEO of Vox Media.

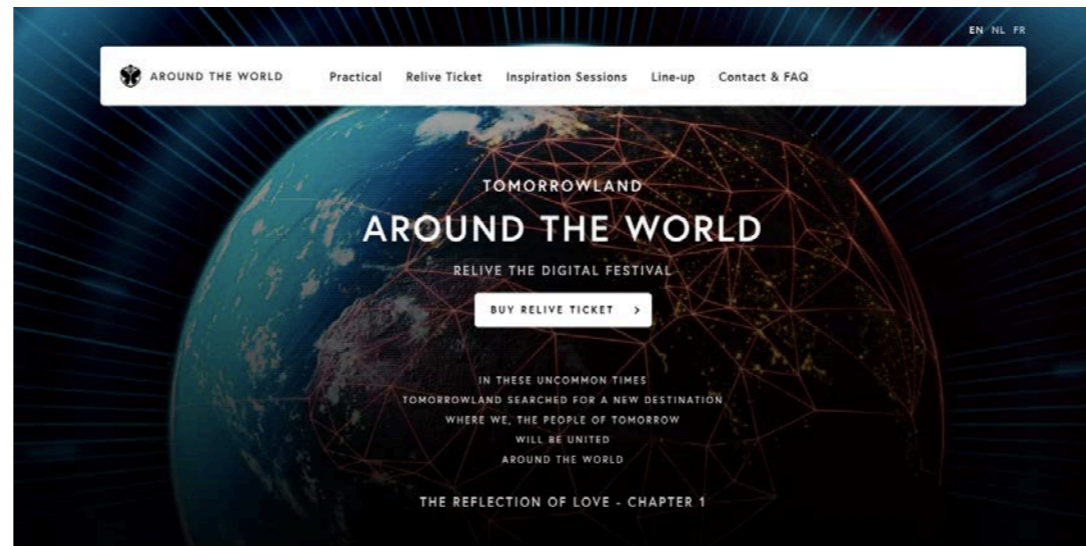
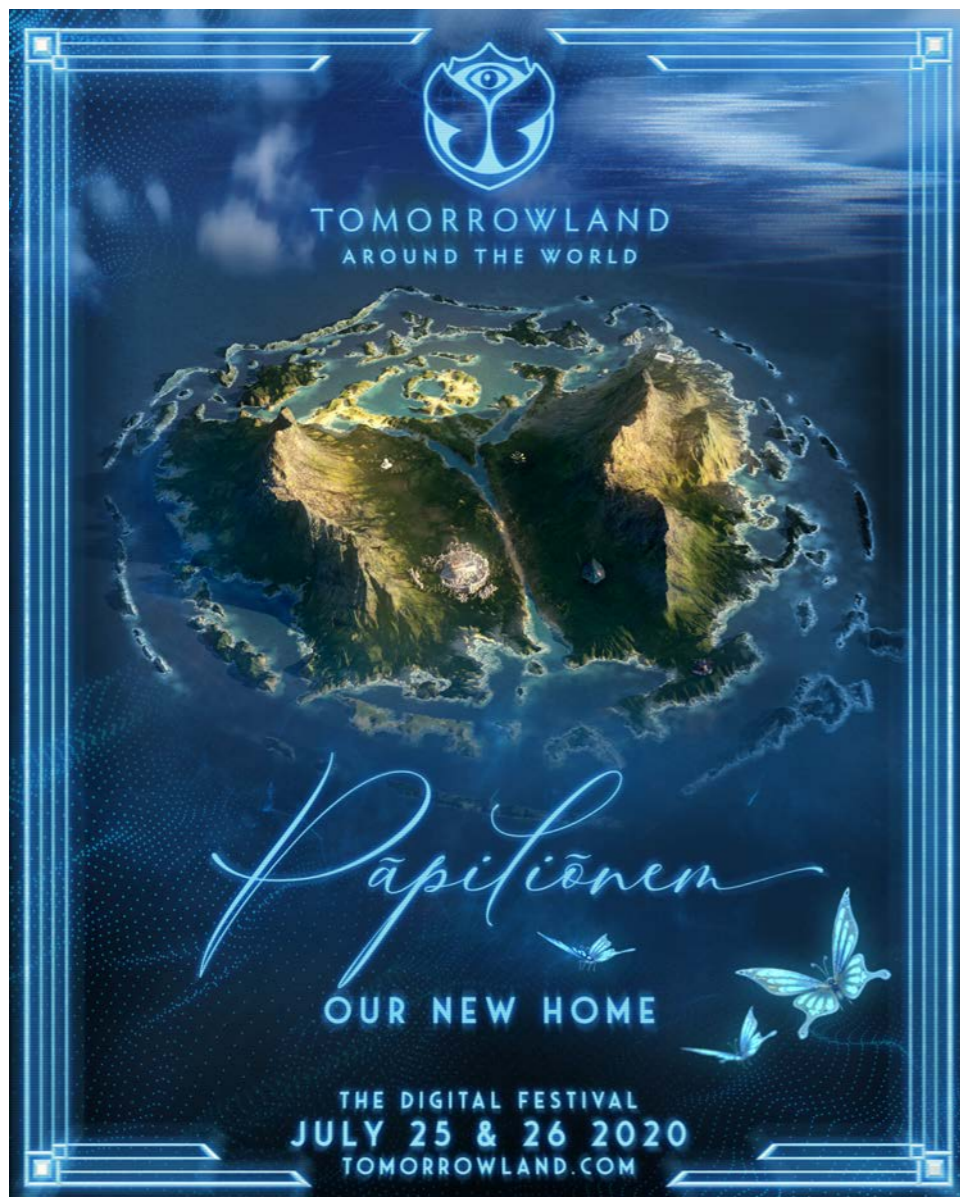
Kopit Levien who also modernized The Times' advertising business to rely more heavily on creative digital solutions, like sponsored content, than traditional print ads.

She expects The Times to move into new spaces "with more vigour."

Over 1 million fans paid to watch a virtual Tomorrowland - one of the most known dance festivals.

They also tested a new (digital) model.

While fans pay for €20 weekend tickets (€12.50 day tickets), the Belgian organizers are paying artists by their views and overall ticket sales. This new model could be a first in the festival livestreaming world.



Tomorrowland Around the World custom designed a fictitious island named Pāpiliōnem, 3-D built 8 digital stages that guests can virtually walk through, including their signature stages that fans know and love.

Like media, talent needs to move into “new spaces”.

To bridge the gap of greater polarisation, we need more “range” or “improvisers”.

Job futurists in Australia say we have to become flexible Jack/Jill of all trades, because the future is fluid.

“Ten years ago being a generalist was a bad career move but now it will serve you well. But things are changing so quickly - a better plan is to have a broad set of skills you can use to pivot and adapt.”

Research shows that hiring is looking like a barbell. We are entering a time where there are basically two large groups of workers

1. lower paid with routine skills and
2. higher paid, with unique skills.

Or jobs are defined as

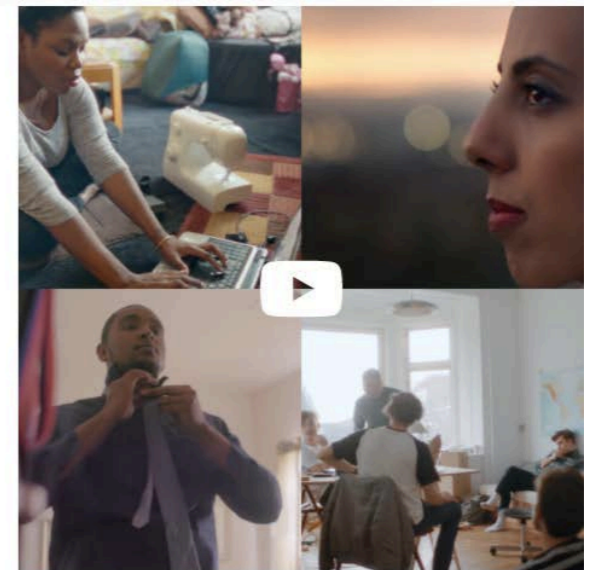
1. more career-oriented *versus*
2. task-oriented.



Which is why government agencies will do well to partner with learning organizations. For eg, Google launches Skills Ignition SG partnership for Singaporeans.

stronger
Grow with Google

Since 2015, we've helped millions of people find a job, grow their career or business. Now, we are here to help accelerate economic recovery through our technology, tools and training; so that local businesses, communities and people can grow stronger, faster and more resilient.



In partnership with

The beauty of people who know how to improvise.

Amid the pandemic, corporations are suddenly in need of individuals who, in tamer times, usually live on the fringes of the company — those skilled at improvising in their work.

The pandemic has proven that we have less control in business than we'd like to think. And the short time frames for change mean we have a desperate need for improvisation.

But who are the improvisers?

They are unique people who know how to be in the moment — looking at the truth of what's specifically happening around them. This requires the ability to avoid the distraction of settled corporate theories, models, and 10 year strategic plans.

With this clear vision, the improviser knows how to find those things which are most critical at THIS point in time — things that build within and upon the corporate foundation but in fresh new ways.

A skilled improviser is a realist — quite aware of the dangers that accompany improvisation. They also have a unique skill at taking risk and turning possible mistakes into successes. (In Jazz improvisation that there are no mistakes — only opportunities to turn what you didn't mean into something better.)

And the improviser knows how to take action based on what they see — to take advantage of the new opportunities which have emerged.

But take it from **Doug Garnett** who's criss-crossed more career paths than most, says: *“The improviser who knows how to take action based on what they see – to take advantage of the new opportunities which have emerged.”*

Doug Garnett is the President of innovation consultancy, Protonik, and previously founder and CEO of TV ad agency, Atomic Direct. He's also the adjunct professor of general advertising at Portland State University.

The power of improvisation - from jazz to business

Improvisation is a skill companies need at all times. Only during a pandemic does it become a skill they can't live without.

THE BIG THREE

1. You've got to be "*in the moment*" – aware of what's going on around you.

2. Improvisation does NOT mean working without a plan. When you improvise in jazz you play with a script (the melody, a chord progression and a platform of rhythm and style). Then you make it even better with risks that turn the whole result brilliant. Interestingly, the jazz musicians we love to listen to, don't abandon melody in their improvisation – they build on it and around it and through it. And that creates a unified result. (Like both Dave Brubeck and Paul Desmond in their improv's in "Tangerine", like much Phil Woods, or like all of Thelonius Monk.)

3. When things shift, you've got to be nimble – take advantage of the opportunity that risks open and make it sound like it was intentional – and make the final result better. *How?* Sometimes by sticking with the new thing you discovered. Sometimes by integrating it into what you do in the future. But most importantly, by making what you do fit within the moment of music – feeling live and exciting.

Doug Garnett finds that we will get to far better solutions if we keep our options flexible and selectively improvise as opportunity presents itself.

Cool! I'd love more observations.
hello@oneseed.be

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