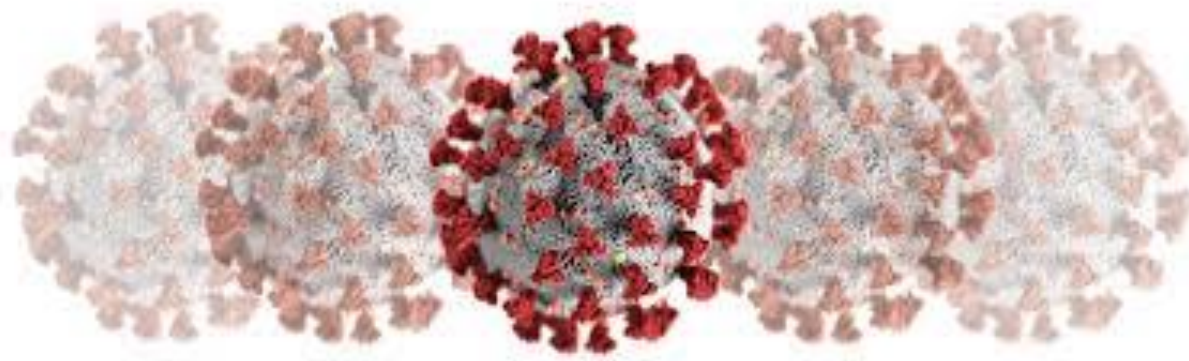


COVID-19

(COrona Virus Disease 2019)



Resetting For the New Normal - What Opportunities Await

What Will be Covered in Today's Conversation

- 1 The data of COVID-19: Understanding this pandemic virus and how to track it with time.
- 2 The macro economic implications of COVID-19 down to the micro economic level.
- 3 What is a “business continuity plan” and how do you use this to chart your future.
- 4 COVID-19 is ACCELERATING the “digital future” – No business will be immune.
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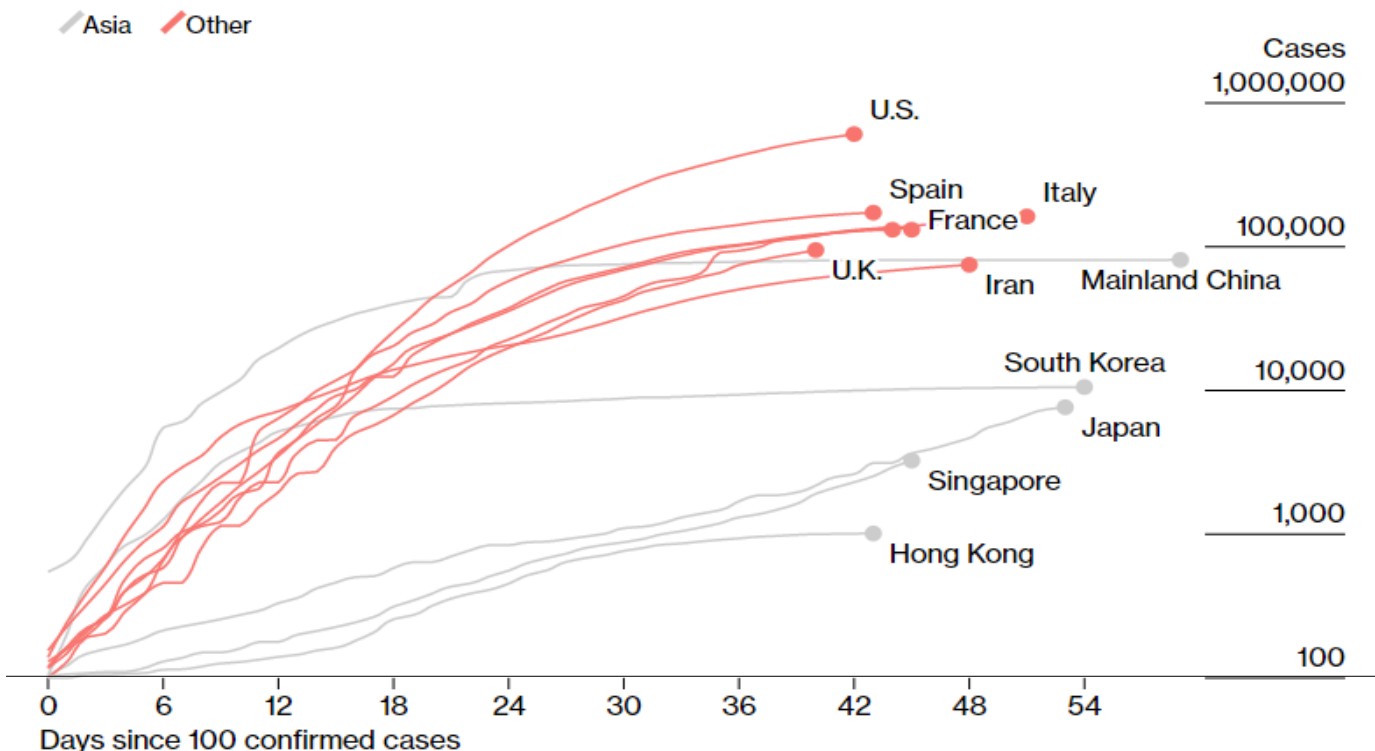
Executive Summary

- Until there is a vaccine or herd immunity we could see continuous disruptions in how we work and live for the next 2 years, resulting in new habits long after
 - Disruption is changing how we eat, work, shop, exercise, manage our health, socialize, and spend our free time - at an unprecedented rate of change
- Although recovery timing is largely dependent on crisis duration and policy effectiveness, unprecedented unemployment is expected to drive an unprecedented drop in GDP. 2020 GDP forecasts range between -1.5 to -3.0%, returning to growth in 2021 (3.0% to 6.5%, YoY)
- A new normal should be expected. Both one-time and seasonal outbreaks will have a lasting impact on policies and rules that drive changes in behavior and create both unprecedented stress but also opportunities
- External experts' overall recommendations:
 - Focus on strategy and “New Normal Transformation” for scenario planning, assessment and orchestration of initiatives; drive top-down efforts for opportunity capture and defense
 - Prioritize digitalization and data operations enhancement

COVID-19 Epidemiological Situation Overview

Until there is a vaccine or herd immunity we could see continuous disruptions in how we work and live for the next 2 years, resulting in new habits long after

Confirmed Cases by Country



- Some countries show plateau, whereas others show upward trajectory
- Predicting the curve is difficult: containment vs (regional) resurgence

The Imperatives of Our Time

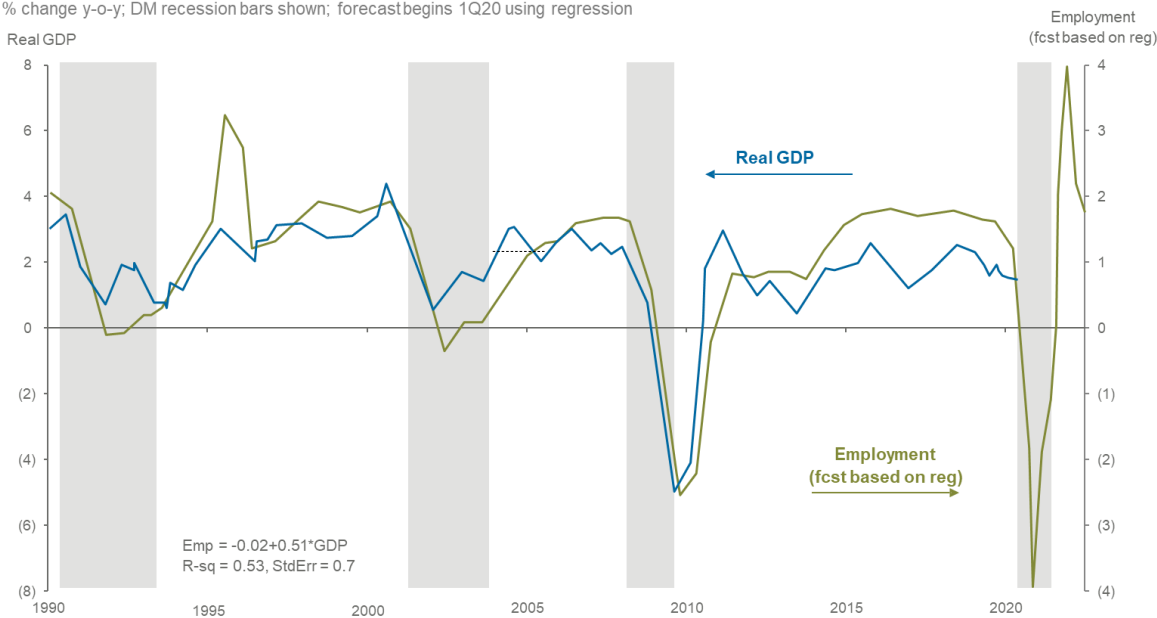
- **Safeguard our lives**
 - Suppress the virus as fast as possible
 - Expand treatment and testing capacity
 - Find “cures”; treatment, drugs, vaccines
- **Safeguard our livelihoods**
 - Support people and businesses
 - Prepare to get back to work safely
 - Prepare to scale the recovery

Economic Outlook and Recovery

Although recovery timing is largely dependent on crisis duration and policy effectiveness, unprecedented unemployment is expected to drive an unprecedented drop in GDP

Unemployment rates reach new heights

Real GDP and employment, developed market



Potential Recovery Scenarios

- Virus Contained:**
1. Mass testing and precautionary measures taken
 2. Lockdown duration 2-3 months
 3. People return to work by May-Jun
 4. No excessive strain on the health care system

Slow ST & Strong LT (U) Economic Growth	IHS Mc	Strong ST & LT (V) Economic Growth	JP MS
--	-----------	---------------------------------------	----------

- Virus Not Contained:**
1. Slow to achieve mass testing
 2. Second wave of the virus occurs in the fall of 2020
 3. Prolonged social distancing and regional shelter in place or quarantining
 4. Regional strain on the health care system







Slow ST & LT (L) Economic Growth	B GS	Moderate ST & Strong LT Economic Growth (U)	B GS
-------------------------------------	---------	--	---------

- Partially Effective Economic Policy:**
1. Economic policy not sufficient enough to effectively stem the economic fallout
 2. Moderate to significant permanent job losses
 3. Moderate to significant business failures

- Highly Effective Economic Policy:**
1. Economic policy is extremely stimulative
 2. Modest to no permanent employment destruction
 3. Modest business failures

New Normal

Both one-time and seasonal outbreaks will have a lasting impact on policies and rules that drive changes in behavior and create opportunities

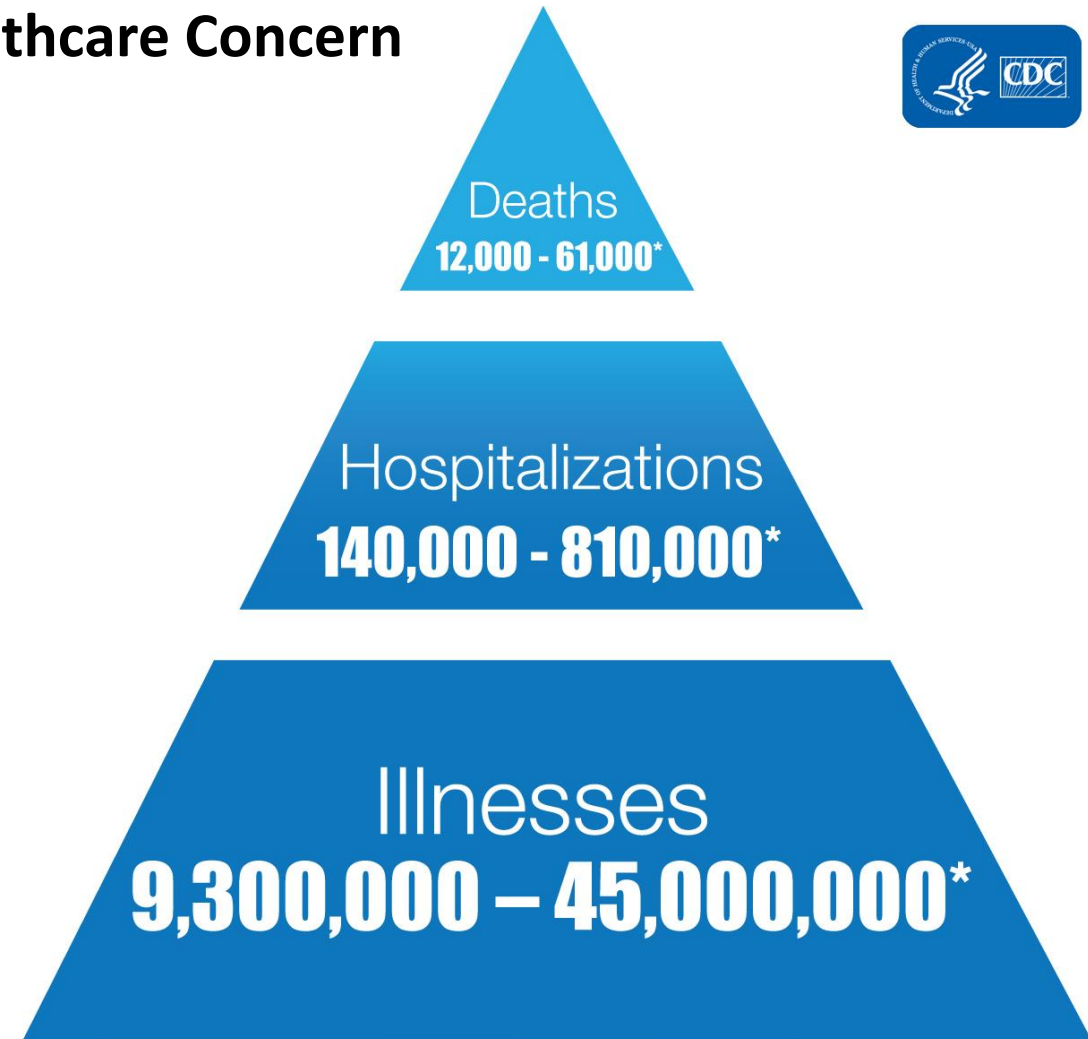
	Customer 	Business 	Government 	Technology 
 <p>One-time outbreak Virus contained gradual recovery (Mc)</p>	<ul style="list-style-type: none"> Increased WFH (Mc) Cleanliness and social distance the new norm (K) Higher priority on health (K) 	<p>Slow recovery for business where social contact is higher (K)</p> <ul style="list-style-type: none"> Blue collar workers equipped to work together (K) 	<p>Economic stimulus (JP)</p> <p>Welfare and business support while deficit shoot up (K)</p>	<ul style="list-style-type: none"> Online collaboration tools Increase (SH/MS) WFH and remote education equipment (MS/SH)
 <p>Seasonal outbreaks Virus resurgence slow prolonged recovery (Mc)</p>	<p>Increased anxiety and depression (BI)</p> <p>Take out everything & automated stores (K/BI)</p> <p>Austerity as the norm (Mc/K)</p> <p>Attention on sustainability (B)</p> <p>Value on certified immune contact (BI)</p> <ul style="list-style-type: none"> Personal priorities are reshaped (BI/K) Surveillance mechanisms acceptance (SH) 	<p>Companies in certain sectors contract or go out of business (K)</p> <p>Logistic and last mile providers increase business (K)</p> <ul style="list-style-type: none"> Online business mainstream and traditional channels disrupted (K/B) Supply chain rearchitected in multiple geographies (K/B) <p>Long term No business travel & public events (BI/K)</p>	<p>Rising tension & conflicts at all levels (BI/K/D)</p> <ul style="list-style-type: none"> Health patrol a new government role (D/B) <p>Asia merges with less economic impact (D)</p>	<ul style="list-style-type: none"> Investments of infrastructure to enable remote work (MS/K) 3D printing as a regional tool for local manufacturing (MS/SH) Increase in medical technologies (MS) AI, Virtual Reality accelerate grow (MS)

So why is this flu virus such a big deal?

Every Single Year Flu is a Major Healthcare Concern



Important to keep things in perspective though that in itself may create anxiety for people. The chart to the side shows the annual ranges of “common flu” impact in the U.S. over the last 10 years (what range to expect each year). For example, last year, a bad flu year, the CDC estimated 61,000 deaths and 45M illnesses inside the U.S.. Other estimates have been as high as 80k deaths last year.



*The top range of these burden estimates are from the 2017-2018 flu season. These are preliminary and may change as data are finalized.

Why COVID-19 is Such a Concern

Median hospital stay



Hospitalization rate



Fatality rate

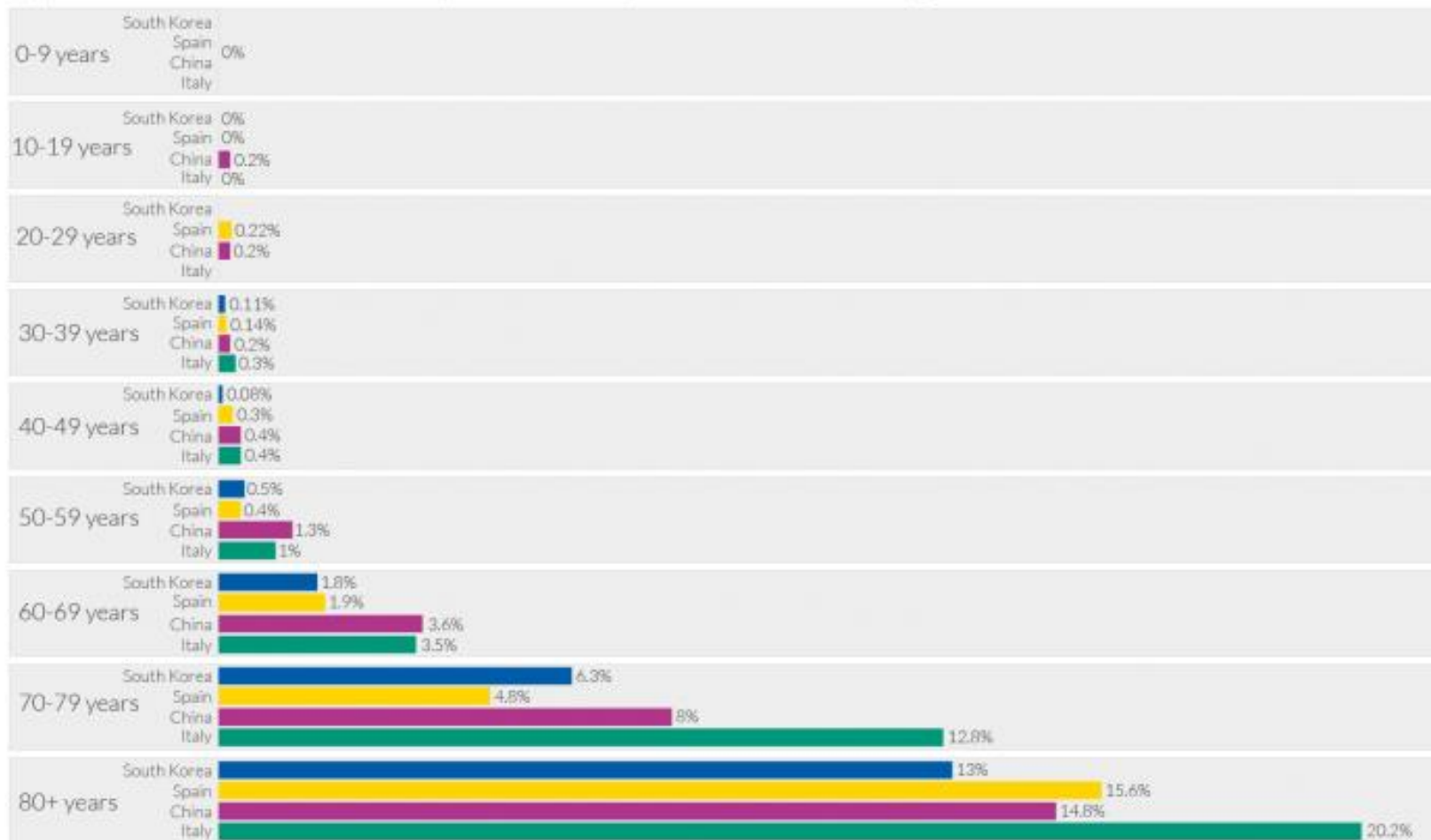


Coronavirus: case fatality rates by age

Case fatality rate (CFR) is calculated by dividing the total number of confirmed deaths due to COVID-19 by the number of *confirmed* cases.

Two of the main limitations to keep in mind when interpreting the CFR:

- (1) many cases within the population are unconfirmed due to a lack of testing.
- (2) some individuals who are infected will eventually die from the disease, but are still alive at time of recording.



Note: Case fatality rates are based on confirmed cases and deaths from COVID-19 as of: 17th February (China); 24th March (Spain); 24th March (South Korea); 17th March (Italy).

Data sources: Chinese Center for Disease Control and Prevention (CDC); Spanish Ministry of Health; Korea Centers for Disease Control and Prevention (KCDC).

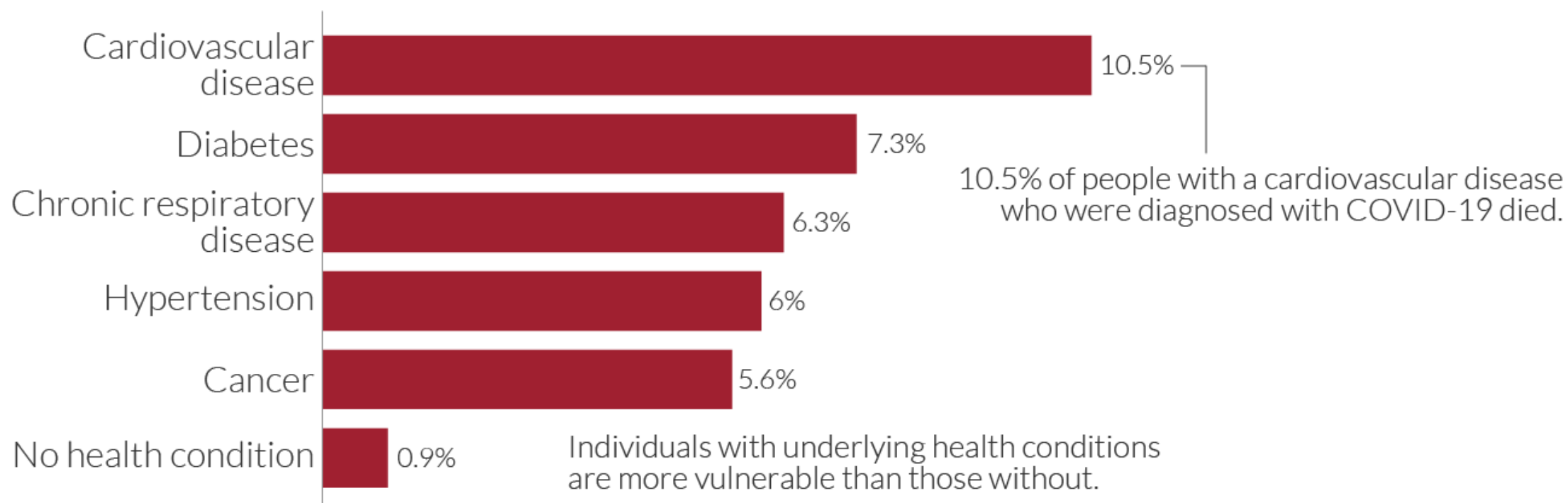
Onder G, Rezza G, Brusaferro S. Case-Fatality Rate and Characteristics of Patients Dying in Relation to COVID-19 in Italy. JAMA.

OurWorldinData.org - Research and data to make progress against the world's largest problems.

Licensed under CC-BY by the authors Hannah Ritchie and Max Roser.

Coronavirus: early-stage case fatality rates by underlying health condition in China

Case fatality rate (CFR) is calculated by dividing the total number of deaths from a disease by the number of confirmed cases. Data is based on early-stage analysis of the COVID-19 outbreak in China in the period up to February 11, 2020.



Data source: Novel Coronavirus Pneumonia Emergency Response Epidemiology Team. *Vital surveillances: the epidemiological characteristics of an outbreak of 2019 novel coronavirus diseases (COVID-19)—China, 2020*. China CDC Weekly.

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Market Impact – How Far Have We Fallen and Is There More to Go?

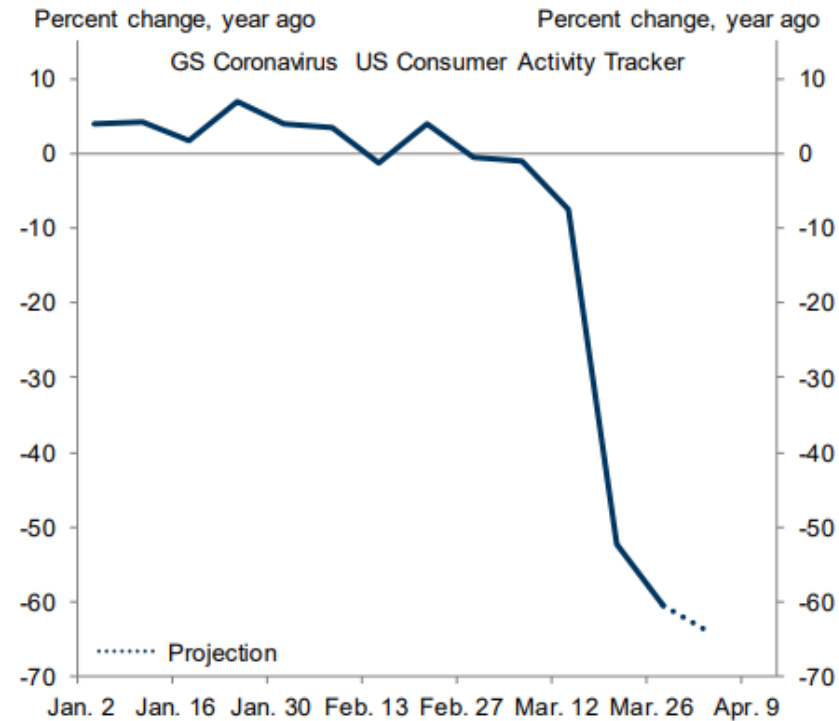
The Velocity and Magnitude of the Current Downturn is Unprecedented

Peak to Trough S&P 500 Performance (Rebased to 100)

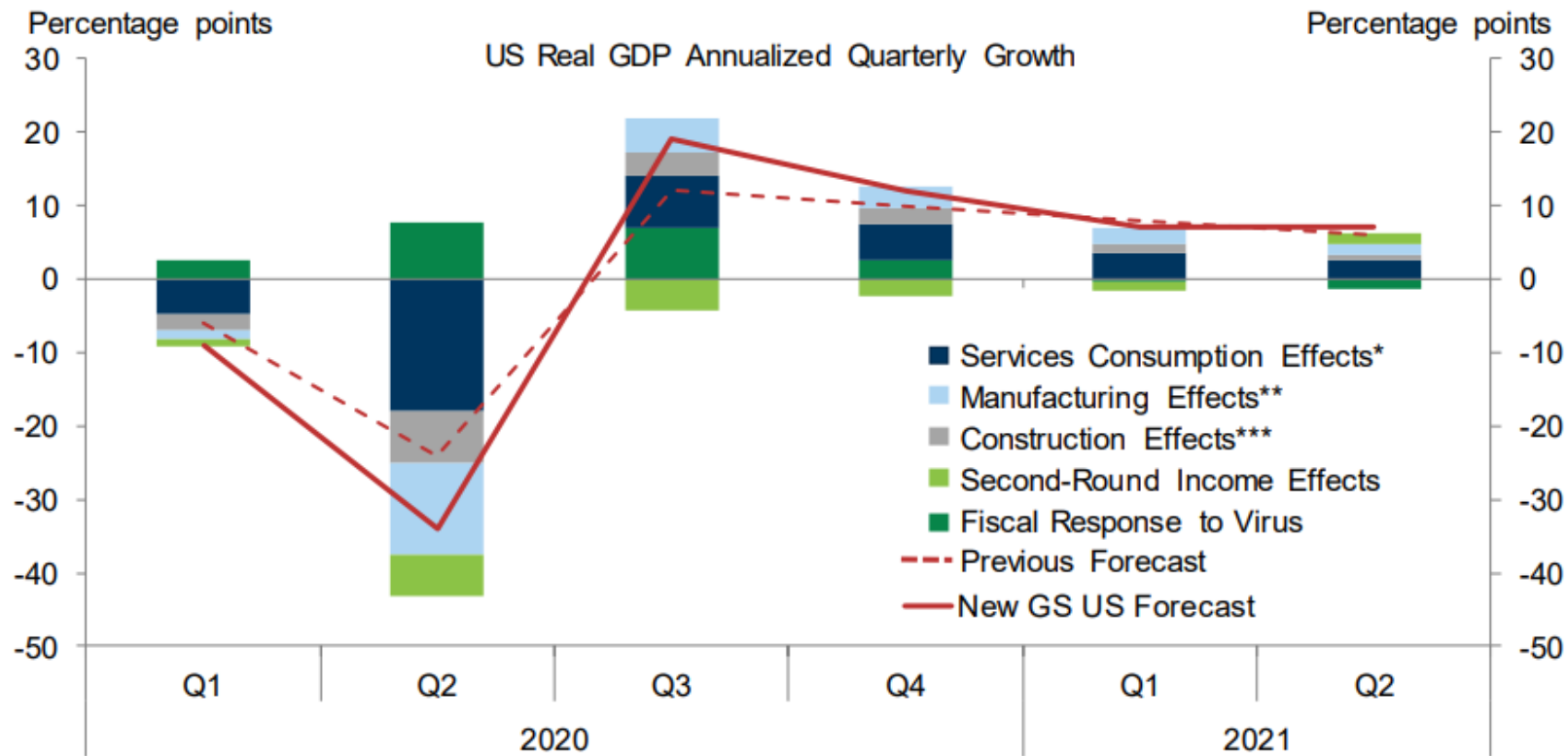


Coronavirus Consumer Activity Tracker Has Plunged

Coronavirus Consumer Activity Tracker		
Activity	Measure	Update
Hotel Occupancy	yoy % change	Wednesday
Movie Box Office	Weekly Gross	Sunday
Broadway Box Office	% Capacity	Sunday
College Basketball Attendance	% Capacity	Monday
Redbook Retail Sales	yoy % change	Tuesday
Commercial Airline Capacity	Available Seat Miles	Monday



...Implies a -34% Growth Rate in Q2 Followed by 12%+ Growth Rates in H2 (QoQ, Annual Rate)



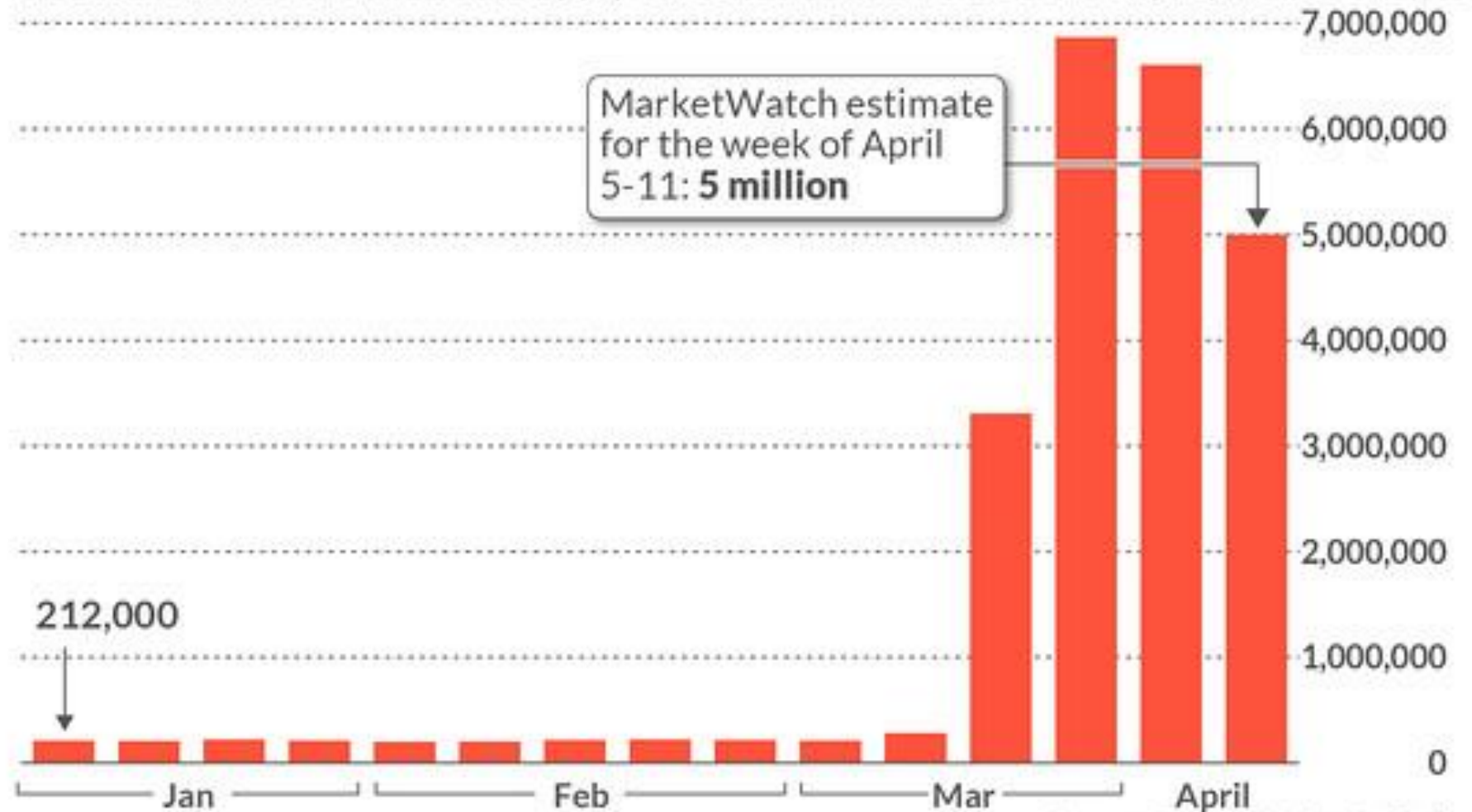
* Includes cutbacks to consumption categories requiring face-to-face interaction

** Includes reduced domestic and foreign demand for goods, supply chain disruptions, and plant shutdowns.

*** Includes cutbacks to structures investment, homebuilding, and home sales.

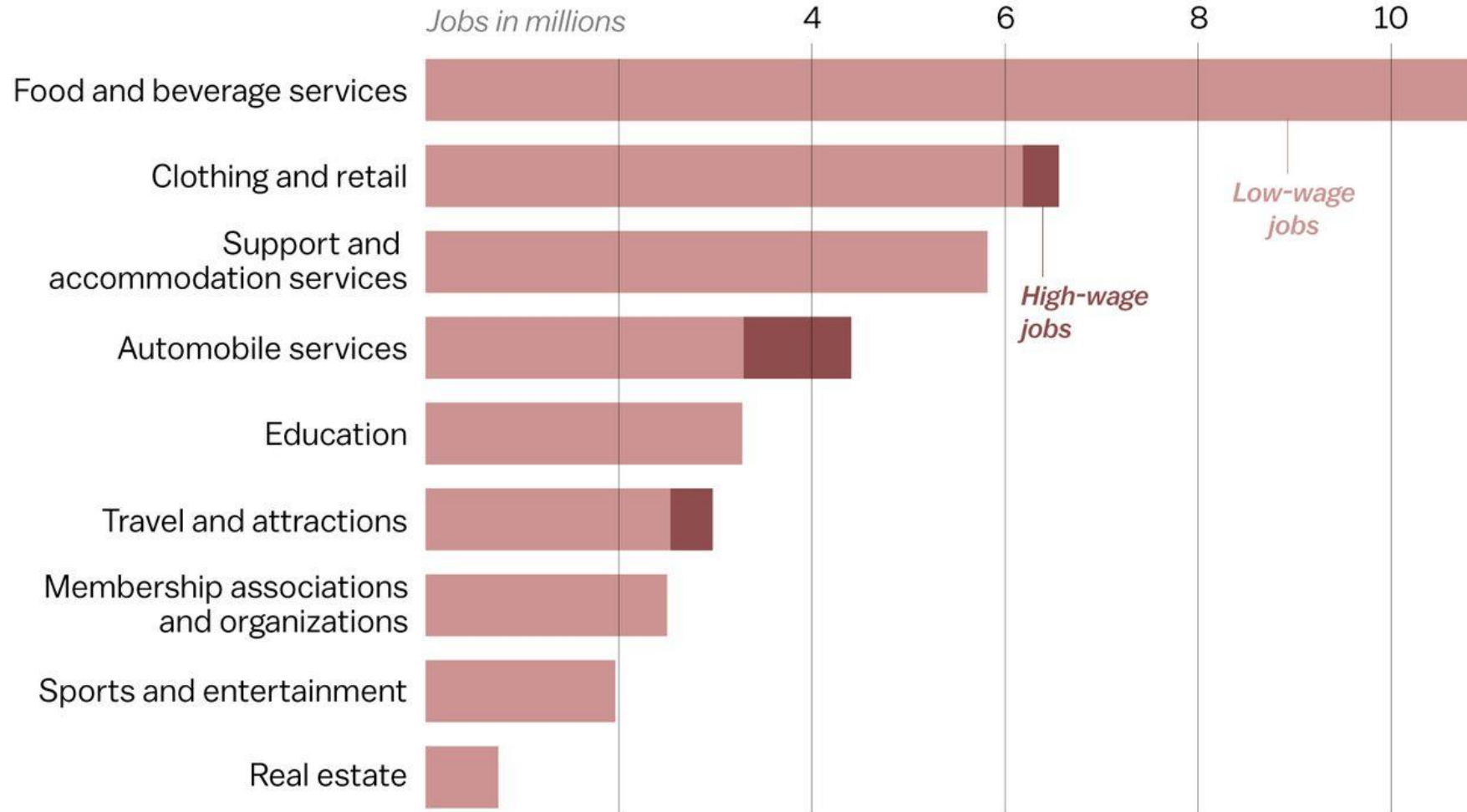
Flood of new jobless claims set to top 20 million

Record number of Americans apply for coronavirus-related unemployment benefits



Source: Bureau of Labor Statistics

Jobs vulnerable to layoffs during the Covid-19 pandemic in the US by industry



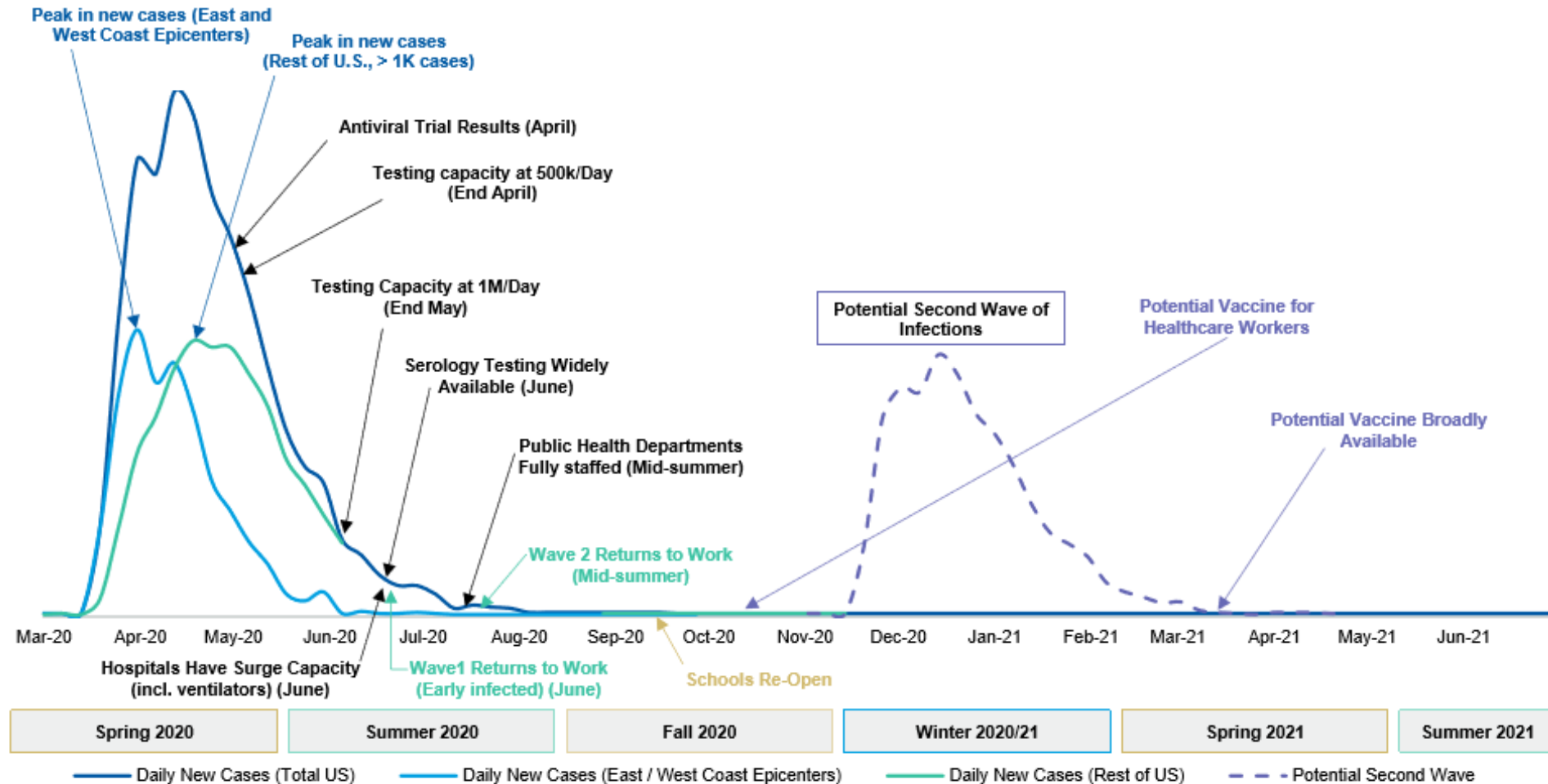
Note: "Low income" jobs are defined as making a weekly income of less than \$801.47. Values are rounded.

Source: US Private Sector Job Quality Index

Potential for “W” Shaped Recovery

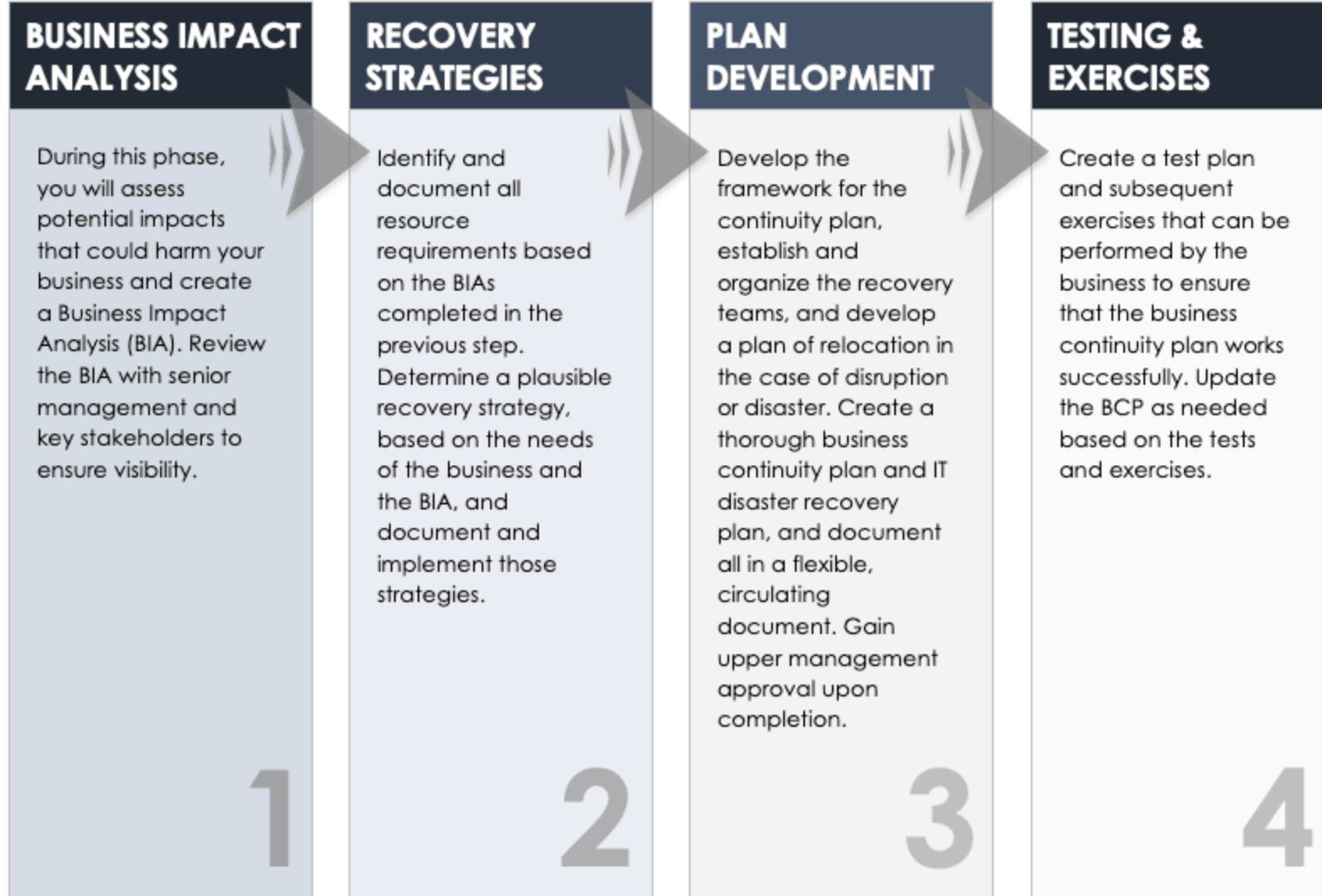
A Potential 2nd Wave of Infections Could Constrain a 2H 2020 Recovery

Actual/Estimated New Case Count (United States, Non-Cumulative)



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BUSINESS CONTINUITY FRAMEWORK TEMPLATE



Getting Back To Business – It Will NOT be Business as Usual for Quite Some Time



Back to Business Recommendations 1/3

- The risk of community – especially true for mass transit.
- Where possible and where it makes sense, the more that can work remotely, the better.
- Reduce the density as best you can. The six foot rule still applies.
- Be careful where meals come from, but more importantly, community types of offerings.
- Cleaning with approved disinfectants - need to stay vigilant.
- Where possible, people should be assigned a single rest room to use if there are multiple choices.
- Large offices or operations may want to institute A&B shifts or teams that do not interact personally.

Back to Business Recommendations 2/3

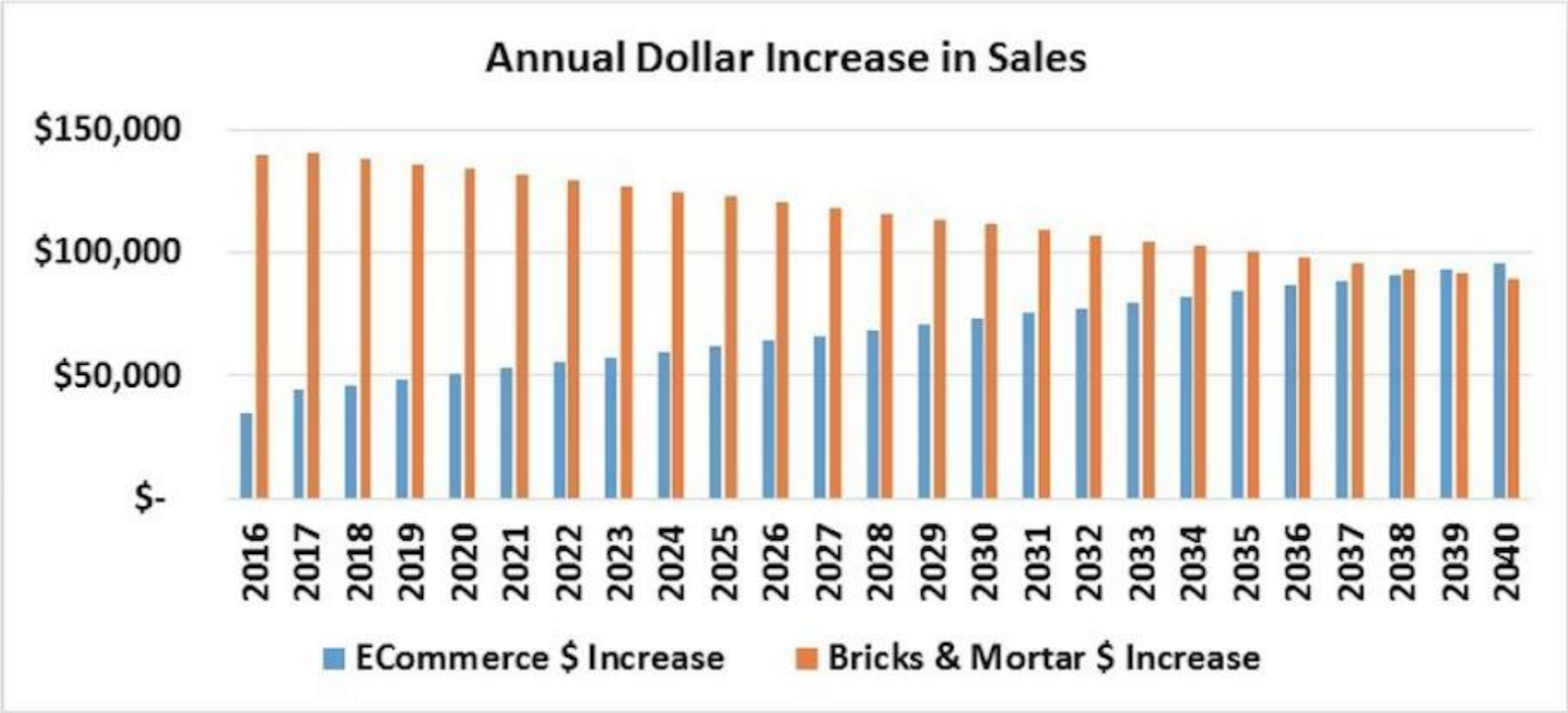
- Try and limit business travel as much as possible, especially true for highly impacted cities or international trips.
- Having employees use approved face masks is highly recommended.
- Encouraging people to wipe down and disinfect their own area frequently highly recommended.
- Hand sanitizers widely distributed highly recommended.
- And very importantly, LOTS and LOTS of communication to the employees make sure they understand the seriousness of the situation, the reasons behind your actions, and a forum to discuss their concerns.

Back to Business Recommendations 3/3

- Many people are rightfully very concerned about coming in contact with anyone and this will include your business and its employees.
- You will want to be able to conduct as much business as possible virtually. Your business should be VERY easy to connect with virtually including live.
- You will want to make sure you adhere to all the State requirements. One situation can shut you down for some time.
- Go overboard making sure that your customers know that you are taking every precaution to keep them safe. Grocery stores have done a very good job of this.
- Customer “intimacy” has never been more important in these times when physical space distancing is so critical forcing less intimate interactions.
- Should your business involve customer visits (home, office, shop, or whatever), go to great lengths ahead of time to demonstrate you are taking this all seriously, and do have your employees demonstrate the same on the job. Easy to become numb or complacent.

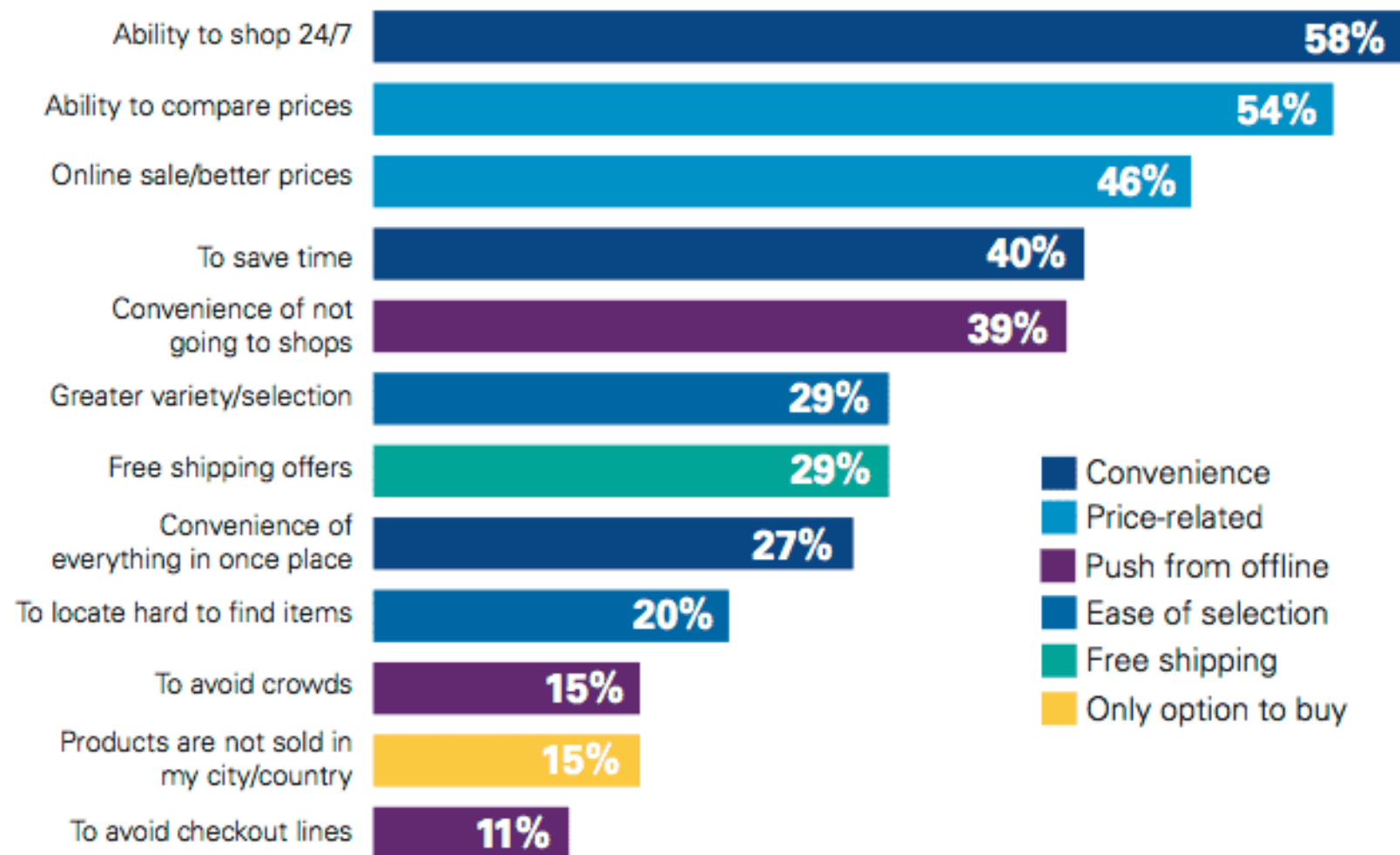
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Relevant Business Requires Relevant Digital Skills



(Dollars in millions, so the top line is \$150 billion)

Reasons consumers shop online instead of in stores



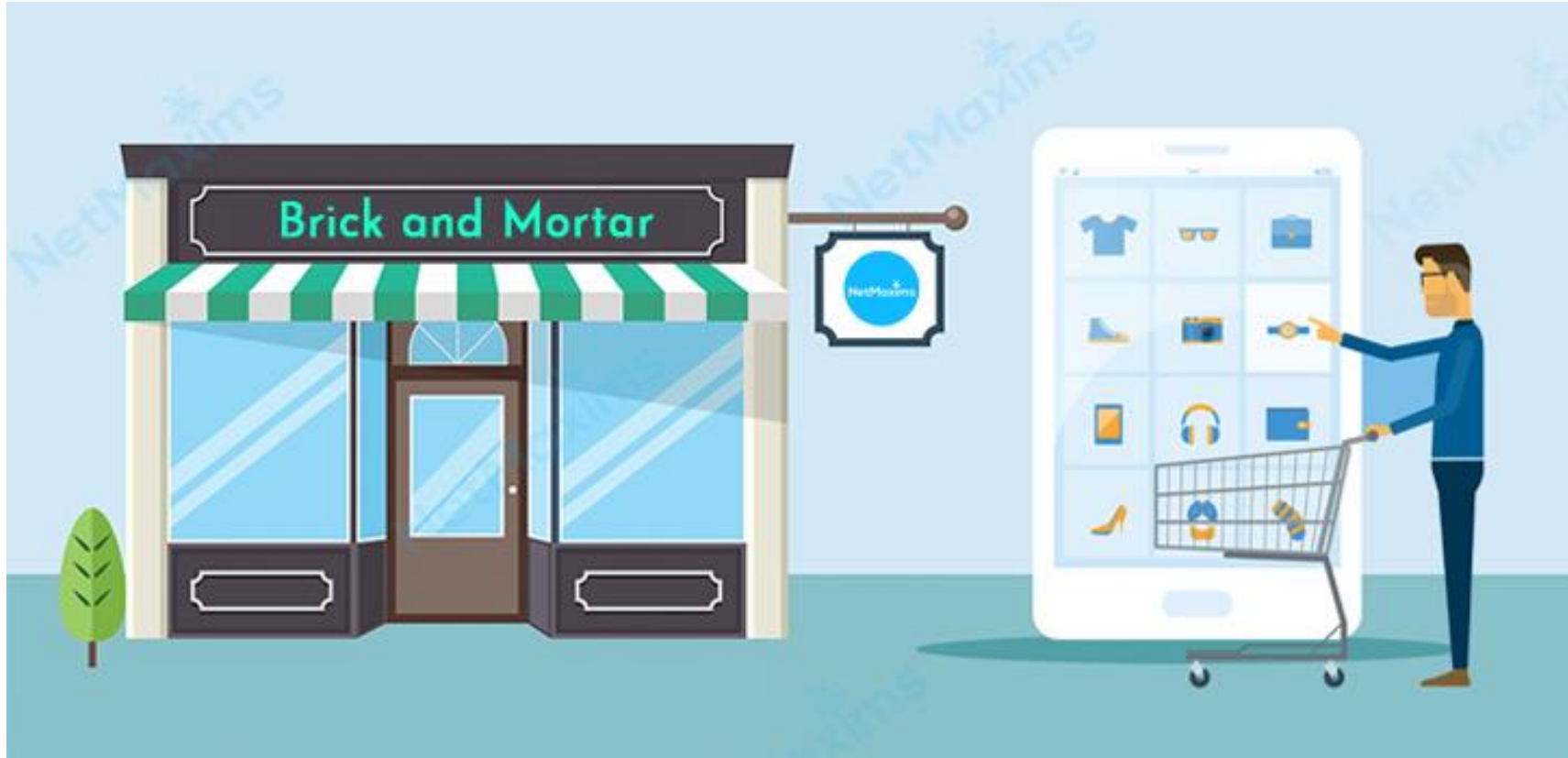
Source: Global Online Consumer Report, KPMG International, 2017

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Social Media Tools



This vs That?



Better if: This + That; This or That

Great Old Advice – More POWERFUL Tools Than Ever



**“Early to bed,
early to rise –
ADVERTISE
ADVERTISE
ADVERTISE!!”**



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We provide DIY Projects, Crafts, Information, Inspiration, Tips, and Ideas through different articles. Most of the content includes topics such as inspirational videos, latest DIY trends, design, art and much more. DIY & Crafts main target...



Making a Live Edge Coffee Table using Epoxy & Stones

a day ago · 361.3K Views

2.2K



25.000\$ Ultimate PC Build for Rendering & Storage

5 weeks ago · 767.6K Views

8.1K



DIY Bridal Flower Bouquet

9 weeks ago · 8.7M Views

36K

All Videos



How To Clean A Motorcycle Cylinder

51 minutes ago · 99K Views

646



Woodturning Quarantine Green Bowl

2 hours ago · 73.7K Views

589



How To Install Engineered Hardwood Flooring!

3 hours ago · 80.9K Views

217



(Steampunk & Leather)



DIY Cool Plywood



Parquet Floor

See more of DIY & Crafts on Facebook

Log In

or

Create New Account

ment Tiles And Installing

Parquet Floor

Never in history has it been cheaper, easier, more powerful, far reaching to write, produce, direct, star and distribute your establishment, your brand, your value proposition, your story.

Running or managing a business is very hard, much harder than learning these new digital tools. And if you are not up to the task then hire a teenager for minimum wage.



rancho bernardo house cleaners

All Maps Shopping Images News More Settings Tools

About 425,000 results (0.65 seconds)

40+ house cleaners nearby

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Cole's Carpet & Cleani...

5.0 ★★★★★ · See reviews

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Weekend Maids specializes in all kinds of **cleaning**. Pricing options for every budget. Service is available 7 days/week. Request a quote today! Terms apply. Same Day Services. Qualified & Experienced. Open 7 Days A Week.

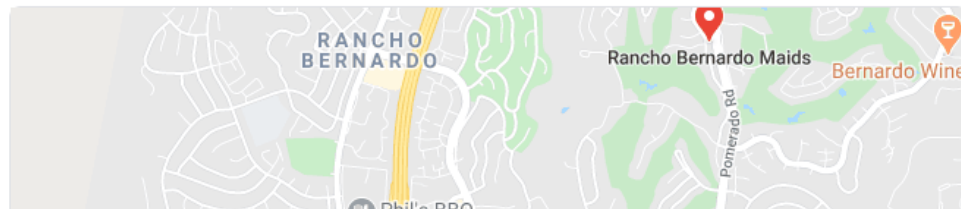
Coupons · Reviews · House Cleaning Services · FAQ

San Diego, CA - Hours & services may vary

Ad · www.homeadvisor.com/local/pros (866) 246-4022

Wall Cleaning Services Pros | Don't Overpay, Compare Pros

Hire The Right Cleaner For The Job. Enter Your Zip & Compare Pros Fast! Find...



And for goodness sake – take great care of your web site, it’s search rank, its review or star ratings and your Yelp ratings!



You absolutely need a social-mobile strategy. 70% of the U.S. buying public has a smartphone!

- 1. Facebook**
- 2. Facebook Messenger**
- 3. Instagram**
- 4. Pinterest**
- 5. Snapchat**
- 6. YouTube**
- 7. Twitter**
- 8. LinkedIn**
- 9. TickTok**
- 10. Yelp**

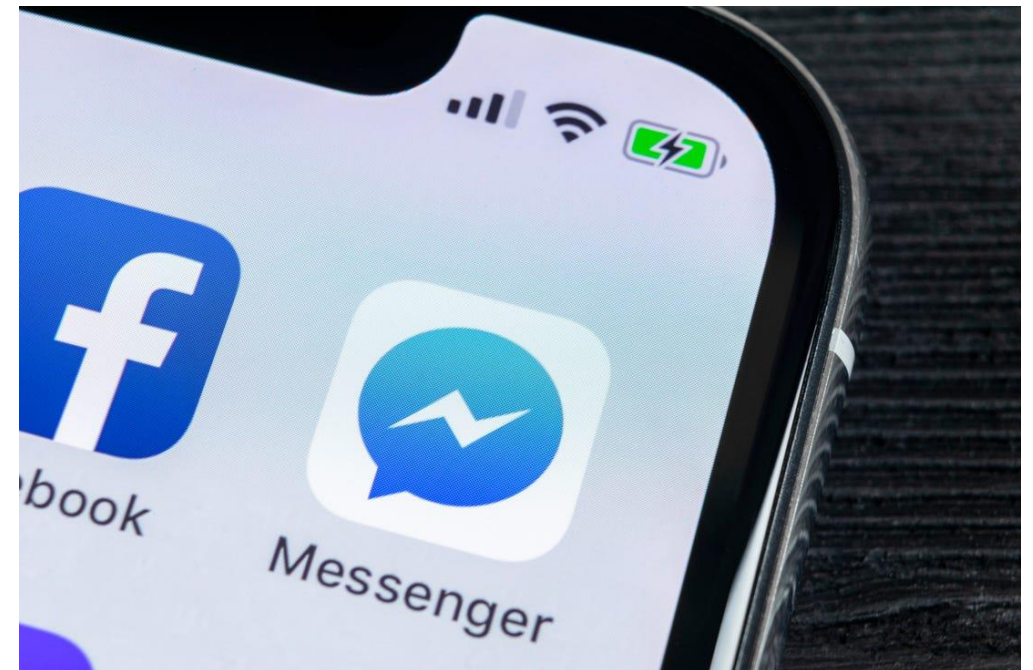
Facebook

- With 2.41 billion daily active users, Facebook is the most widely used social platform.
- Brand awareness, website traffic, lead generation, or online conversions, Facebook should (and more than likely will) make a notable difference in reaching your goals when used properly.
- [Facebook advertising](#) (and a lot of great content!). Facebook's advertising platform is by the far the most developed of all of the social media platforms.
- On Facebook, you can target by age, gender, employment, interests, purchasing behaviors, relationship status and so much more! This gives you the power to target your exact audience and put your ads and content in their newsfeed where they are already scrolling.
- On Facebook, you have to pay to play, so while your target audience is more than likely using the channel daily, you'll need an advertising budget to reach them.
- Combining great content and A/B split testing, with Facebook's extensive, data, user base, and ad platform can be one [powerful combination for your business!](#)



Facebook Messenger

- Facebook Messenger is an app that allows Facebook users to send direct messages to one another, including functionality extending to business pages!
- Because Facebook Messenger is a part of Facebook, it has the same access to Facebook's large user base and advertising platform. You can definitely use this to your advantage!
- Facebook has advertising campaigns that are specifically developed for Facebook Messenger. When someone clicks on an ad, they will be prompted to start a Facebook Message with your business page, and if they do, your business page can follow up with them in messages from that point on.
- If your business model is more focused on lead generation as opposed to ecommerce or more immediate online conversions, then this may be a good option for your business!
- Outside of using [Facebook Messenger advertising](#), you can also set up automated messages for your business page. This way, if someone messages your Facebook business page organically, Facebook Messenger will send an automated message back to them (one that you have crafted).
- Oftentimes, these automated messages say something as simple as, "Thank you for reaching out to us! Someone will respond back to you within 24 business hours. Thank you and have a great day!"



- Because Instagram is owned by Facebook, it has access to the same extensive user base and [advertising platform](#) just like the Facebook Messenger app does.
- Instagram has all of the same paid benefits of Facebook, but Instagram also has its own set of [organic benefits](#) - functions you can perform or results you can achieve without directly paying for them in advertising dollars.
- On Facebook, you have to pay for advertising campaigns to grow your followers and increase the reach of your page and posts. On Instagram, you can grow your followers organically and therefore grow the reach of your profile and posts organically as well! This makes Instagram a great option for both businesses with and without an advertising budget.
- Instagram is also a visual platform, as you can only publish posts that include photos and videos (as opposed to posting copy without a visual creative). This works to your advantage as a business since people remember 80% of what they see as opposed to what they read or hear!

Instagram



- If your business falls within a creative industry of any kind or caters more so to females, then Pinterest is a social media platform you want to be on.
- Pinterest has 291 million monthly active users. Out of those users, 81% are women, 93% of active pinners said they use Pinterest to plan for purchases and 87% said they've purchased something because of Pinterest.
- Food recipes, lifestyle how-to articles, wedding inspiration, and outfit ideas are some of the top searches on Pinterest. So if you're business falls within any of those industries, you need to be utilizing Pinterest as one of your social media sites for business.
- Though Pinterest's advertising platform isn't as advanced as Facebook's, you can still use paid ads to boost the reach of your posts and track online conversions through your Pinterest ads.
- Additionally, Pinterest has some [organic capabilities](#) that other social platforms do not. Organic reach on a Pinterest post is determined by the amount of keywords in a post and if they align with what a user has searched on Pinterest.
- This gives businesses a chance to strategically plan their content to contain words that are searched a lot on Pinterest, without having to use extra advertising dollars!

Pinterest



Snapchat

- Snapchat is an app that allows users to send Snapchats (a photo or video) either directly to another user or to their Snapchat Story.
- A Snapchat sent directly to another user can only be viewed once, but a Snapchat on a Story (such as your business' Story) is visible for up to 24 hours after it's published.
- If your target market is largely comprised of a younger demographic, then Snapchat may be one of the more effective social media sites for business for you!
- There are over 350 million monthly active users, and 203 million daily active users on Snapchat, and 71% of those users are under 34 years old. Specifically, almost half of its users are aged between 18-24.
- Snapchat shares Instagram's advantage of visual content since Snapchat posts have to include either a photo or video to publish.
- In fact, Snapchat has more than 10 million daily video views. Snapchat also offers advertising options where you can pay to have a linkable Snapchat in the Discovery section of Snapchat.



YouTube

- YouTube is a video platform that allows users to watch videos and/or upload them.
- YouTube has 2 billion monthly active users, giving your business the chance to share company content with over 30+ million daily active users who are likely to watch it.
- Similar to Instagram, Pinterest, and Snapchat, YouTube has the benefit of visual content. Owned by Google, YouTube has access to [Google's advertising platform](#), and you can use this to your advantage when running [YouTube ads](#).
- It also mimics its parent company in that you can optimize the search of your company's YouTube videos with the proper keywords.
- Without having to spend extra money on advertising dollars, you can make your YouTube videos have higher search rankings by including the searched keywords in your title, video description, and actual list of keywords in the keywords tool.



Twitter

- Twitter is one of the older social media platforms, and it has 336 million monthly active Twitter users. You can post photos and videos along with character-limited copy
- Twitter is most known for its feed of real-time updates. Is the term “live-tweeting” ringing a bell now?
- Twitter is great for engaging new potential customers through its use of hashtags. Similar to Instagram, you can search a hashtag and find other posts from consumers and businesses alike that have used that hashtag.
- This means that you can find consumers searching for something that your company offers and vice versa!
- For example, if you’re a car wash company, you can literally find people tweeting about how they need to get their car washed depending on how they’ve used hashtags in their tweet. You can then tweet them with a discount for your car wash, and then you’ve most likely have acquired a new customer.

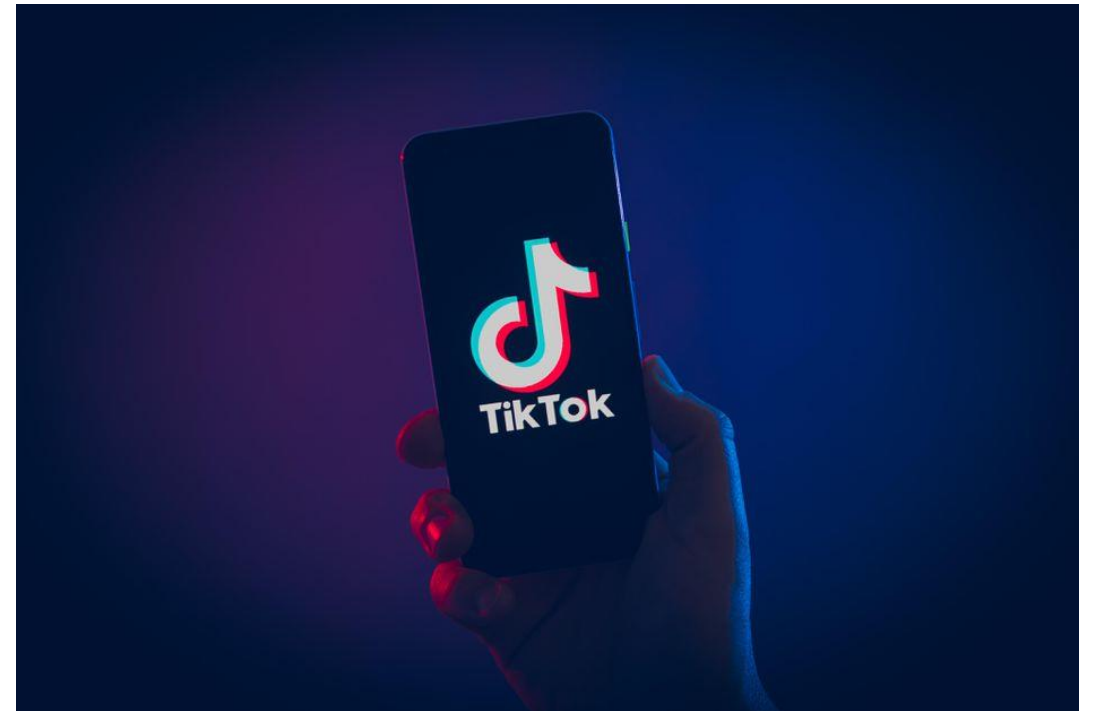


- If your business follows a B2B model, or targets consumers based on job titles, then LinkedIn can be a powerful tool for you!
- LinkedIn has 303 million monthly active users, most all of which are in the working world or close to it.
- Because LinkedIn is considered to be a [social media platform for business](#), people often include more accurate information about their employers, job positions, work email addresses and more than they do on other social media platforms that are utilized more for personal use.
- The Twitter advertising platform is not as advanced as Facebook's in terms of its campaign functions, but it does give you a lot more job positions to target than Facebook does. This can be crucial if the bottom line of your business is dependent upon targeting specific businesses or job titles.



TikTok

- TikTok is a new social media platform that was launched in 2018. It's an app that allows its users to create their own 15 second video clip and share them.
- Now it has 1.2 billion users worldwide with 500 million monthly active users. With these figures, it has now surpassed Twitter, LinkedIn and Snapchat platforms.
- However, although it has so much potential capturing the attention of Gen Z, it still has a long way to go when it comes to advertising. The only way for marketers to use this platform for advertising is through influencers.
- Not that saturated compared to other social media giants like Facebook, Instagram and Twitter, as such, brands or businesses are now using it to reach Gen Z – a market that seems quite hard to reach.



Yelp

- Yelp is not always the first app someone thinks of when they think of social media, but it is on this list because it does play an important role in maintaining your company's brand and image!
- Yelp has 178 million monthly visitors, and those visitors include people who want word-of-mouth confirmation of whether your business provides a positive or negative experience.
- Due to the nature of Yelp, this gives your business the chance to keep up your reputation by encouraging strong reviews and responding to the negative reviews.
- By doing this, you build an organic sense of transparency and trust between your business and your consumers, and this can play a huge part in growing and retaining your customer base.



**SAY HELLO
TO THE FUTURE.**

GET A VIRTUAL STOREFRONT.
OPEN 24/7.



Virtual Stores

**We'll maybe not yet be ready for
"today", but these types of
concepts are already being
piloted in various ways around
the world.**



AR/VR in Shopping



Summary

- This is not a life extinction event by any means, thus we cannot panic.
- That said, the implications of this virus will be with the world for some time, thus we all need to adapt to it.
- This will have a significant impacts on the global economy over the next two years but better days are ahead.
- There is not a lot data that shows the global macro economy was set up to fail as in 2008. Though the initial shock is much greater than 2008, the claw back or recovery should happen faster.
- COVID-19 has dramatically accelerated the shift to digital – business sustainability requires a strategy to thrive in that world.
- COVID-19 will come back, new virus or disruptions will emerge in the future. Be prepared and your chances of being spared are much better.
- Success in the future requires very strong understandings and competent expertise in the digital ecosystems present and future.

“We simply attempt to be fearful when others are exuberant and exuberant only when other are fearful”

- Warren Buffet

“The best things about recessions is that that they always end – plan for it”

- Andy Grove

“As sure as the spring will follow winder, prosperity and economic growth will follow recession”

- Robert Foster Bennett



Thank You!