

The background of the entire slide is a close-up, high-angle shot of a honeycomb structure. The hexagonal cells are illuminated from the upper right, creating a strong sense of depth and texture. The light reflects off the edges of the cells, giving them a three-dimensional appearance. The color palette is warm, ranging from deep orange to bright yellow, with the lightest areas appearing almost white.

KANTAR

Futures Academy

September 24, 2020



Welcome

Your Presenters Today



**Senior Partner, Consulting
Division at Kantar**

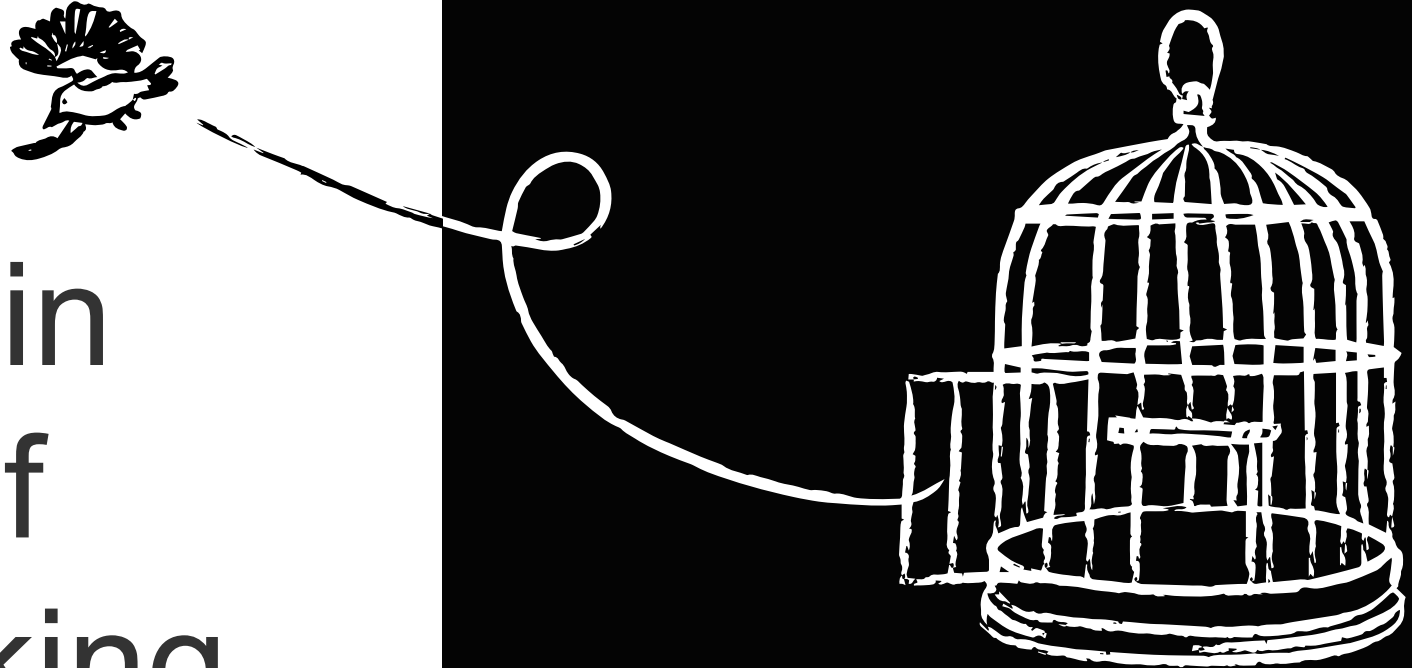


**Senior Director, Human
Insights at Clorox**



**Chief Knowledge Officer,
Brand & Marketing at Kantar**

We believe in
the power of
futures thinking



FUTURES THINKING



A way of thinking about what's possible more deeply, honestly, and strategically.

It opens your eyes, sharpens your senses, expands your view, and prepares you to act.



DESIGN THINKING...

Start with the needs of the user, not the capabilities of the organization.

FUTURES THINKING



EGGS, ELEPHANTS AND HOW
TO BE READY FOR ANYTHING

FUTURES THINKING!

Start with where you
want to go, not where
you've come from.

What may come as a surprise is that – with the right mindset – COVID-19 was an entirely a

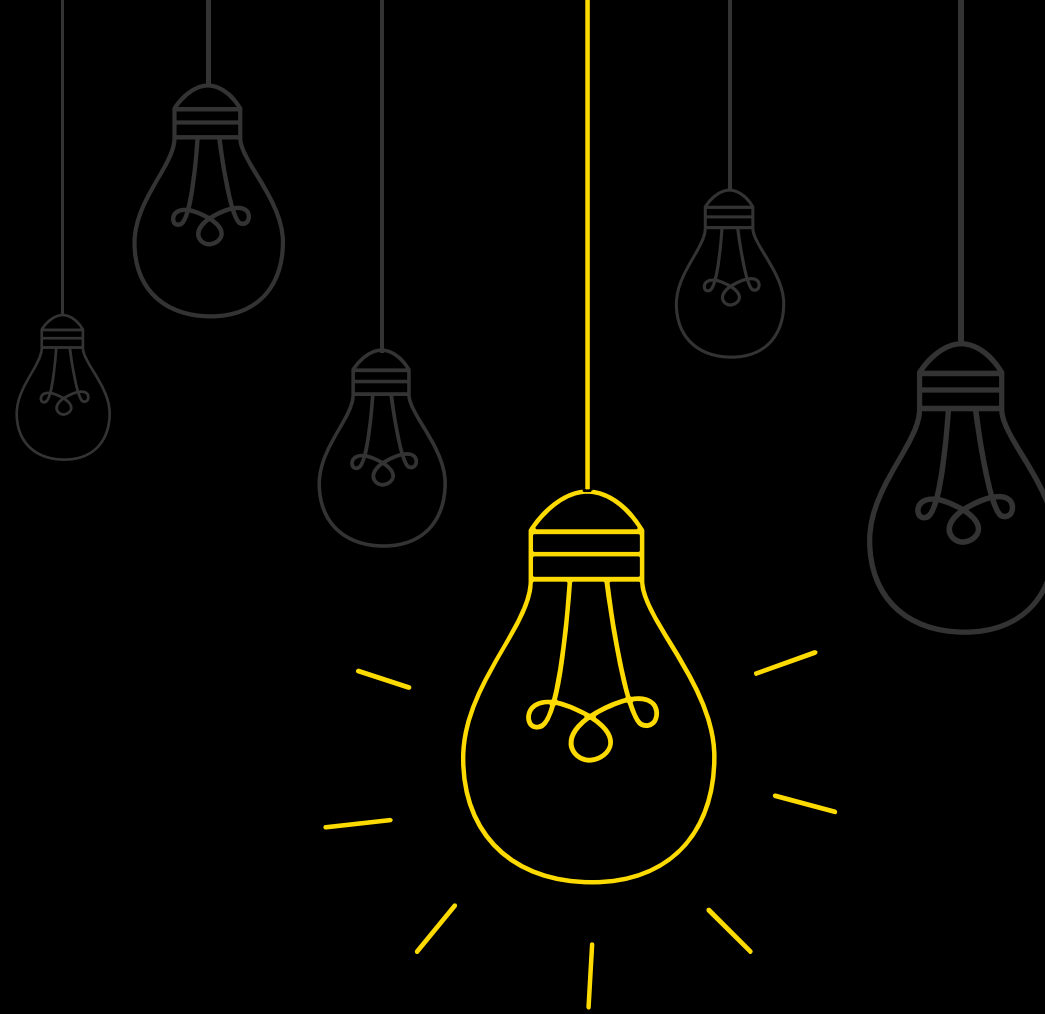
**PREDICTABLE
SURPRISE!**



People and businesses aren't wired to think about the future.

Let's ask ourselves two questions:

1. Why do we need to think about the future?
2. Why is it so difficult to think about the future?

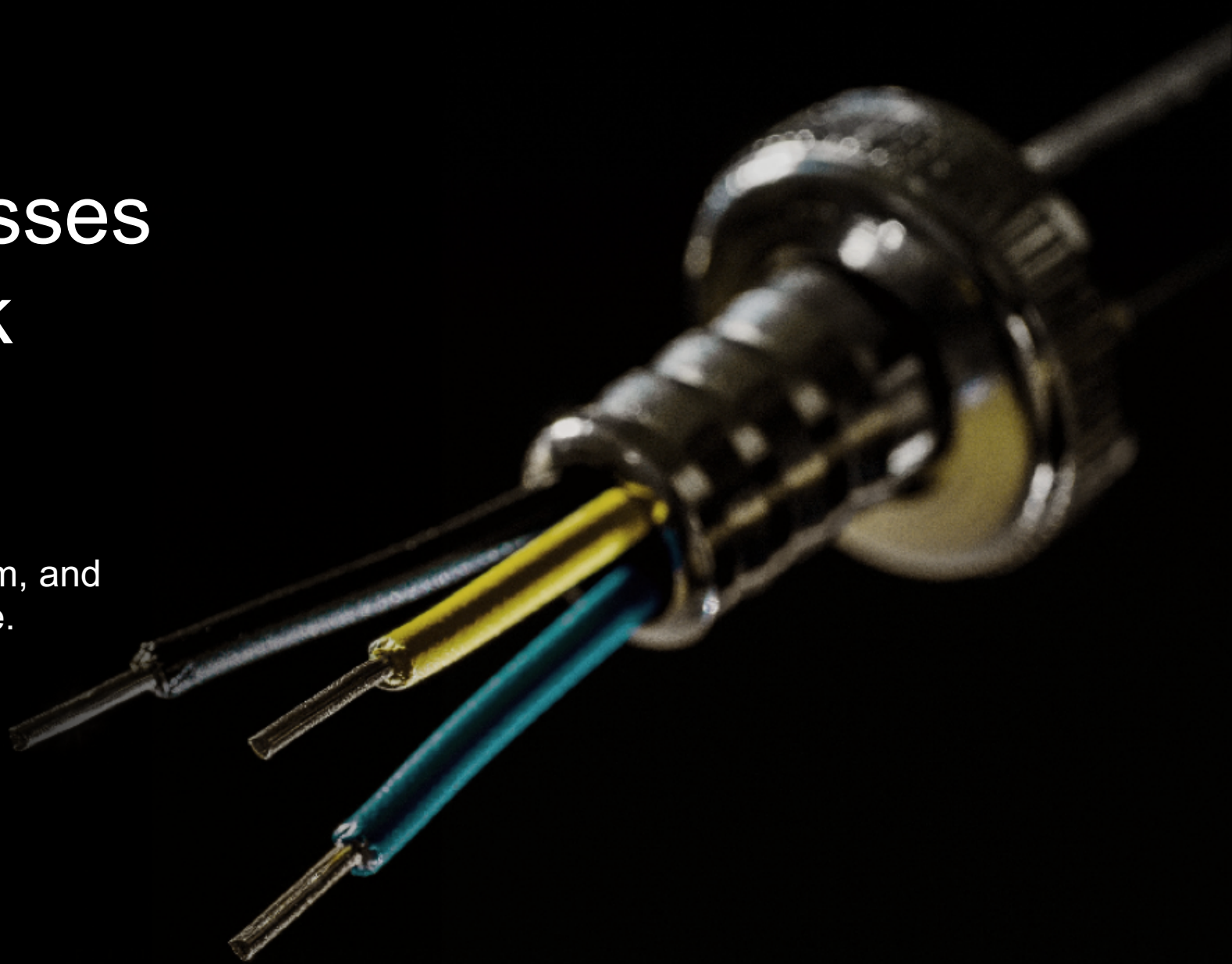


People and businesses aren't wired to think about the future.

Psychologically. We think in the short term, and we're uncomfortable thinking about change.

Structurally. Businesses tend to be short-termist.

Professionally. Bonuses aren't paid on future performance.

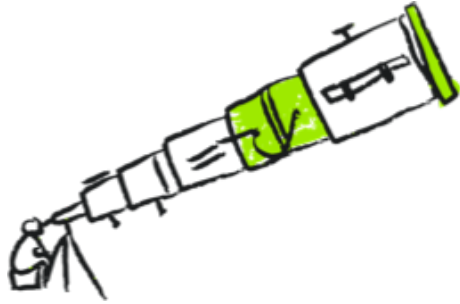


5 Principles



1 SWITCH PERSPECTIVE

Look from the outside in to see the bigger picture



2 LOOK FURTHER

Take a longer view of time to see deeper patterns of change



3 ANTICIPATE VALUES

Understand people's shifting values to anticipate social change



4 SEE CONNECTIONS

Connect more dots to see a richer view of change



5 PREDICT SURPRISES

Take off the blinkers to reveal predictable surprises

Before we dig in – a short story about predicting surprises

Envisioning the Future of Healthcare

A Glimpse into 2015 & the Impact to 2020

Future Dynamics in 2015



1. Minimize Human Limitations



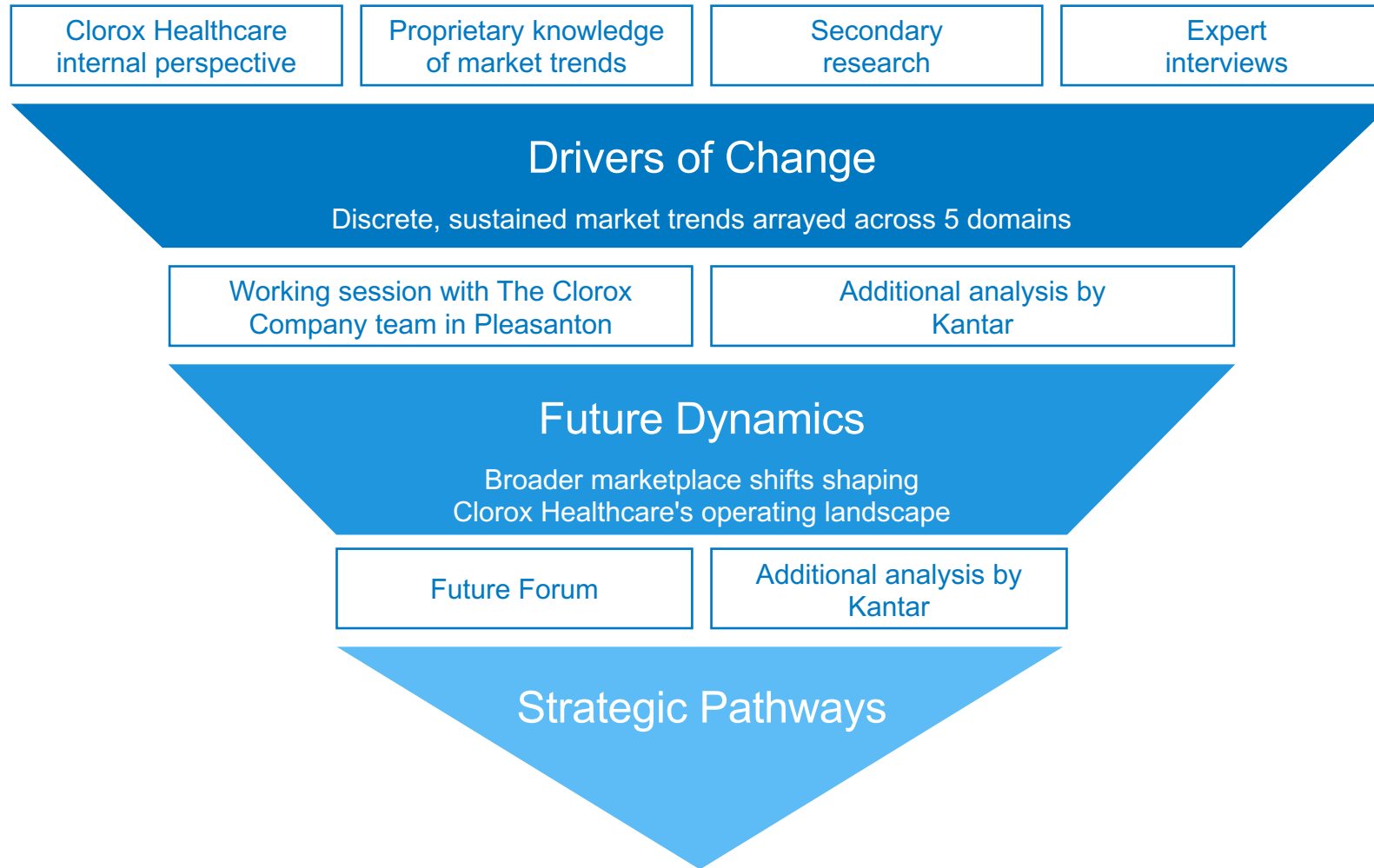
2. Keep Expanding Healthcare



3. Prepare for Global Pandemics



How we got here...

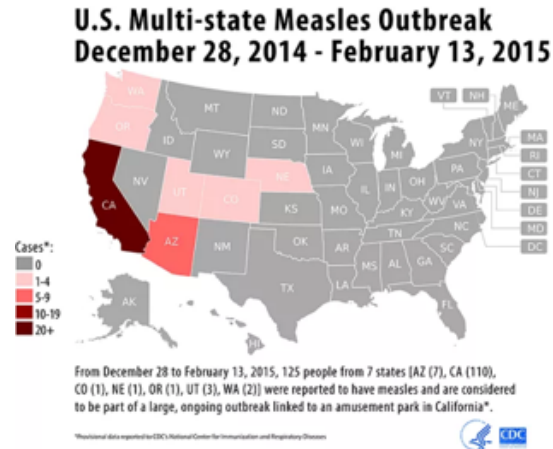




MODERN-DAY BATTLEGROUND

Preventing, detecting and handling impending pandemics

What was Happening Before 2020



Lawrence Tynes says MRSA infection ended NFL career

April 7, 2015

Pat Yasinskas, ESPN Staff Writer



Reported illnesses at Chipotle restaurant swell to 100+

July 20, 2017

Theo Thimou Clark



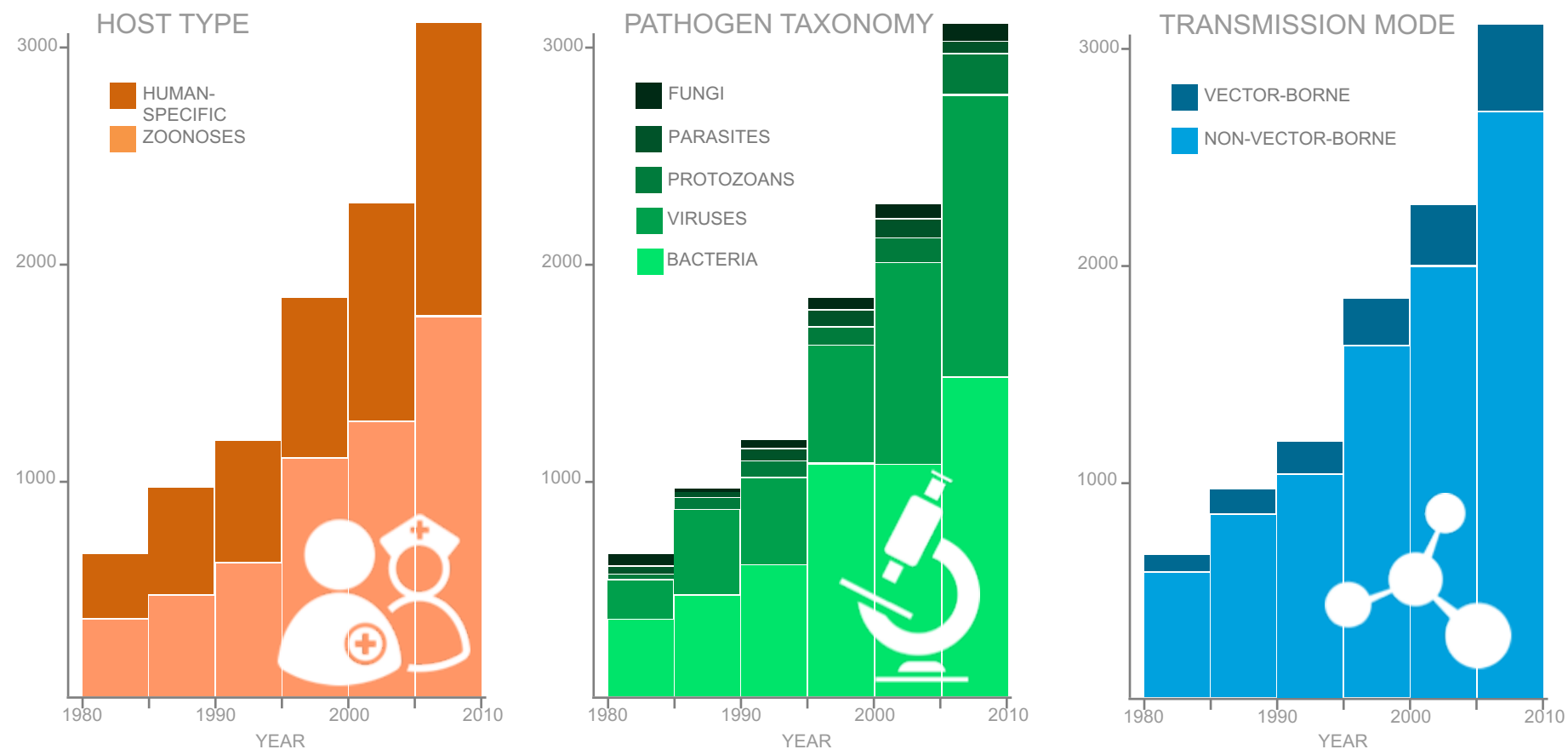
Flu outbreak shuts down Idaho school, 4 out of 10 kids stricken

January 11, 2018

Melanie Dadourian, Fox News,

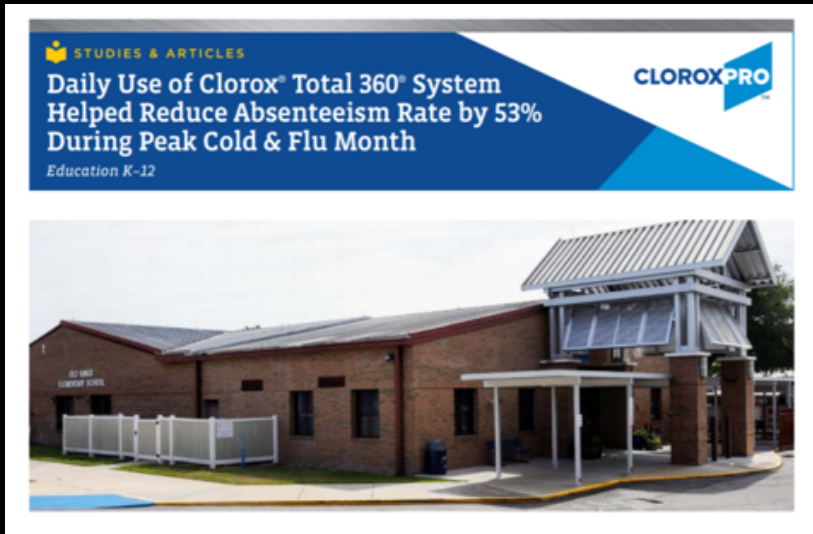
Planning for the Future

GLOBAL NUMBER OF HUMAN INFECTIOUS DISEASE OUTBREAKS 1980-2010



SOURCE: Smith, K. F.; Goldberg, M.; Rosenthal, S.; Carlson, L.; Chen, J.; Chen, C.; Ramachandran, S. 2014 Global rise in human infectious disease outbreaks. J. R. Soc. Interface 11: 20140950. <http://dx.doi.org/10.1098/rsif.2014.0950>

Clorox Total 360



Fast Forward to 2020

Did we predict the pandemic?

The NBA and WNBA Become the Latest Brands to Team Up With Clorox

During the pandemic, the CPG giant has made similar deals with Uber, AMC Theaters and United Airlines

Business

United Airlines partners with Cleveland Clinic, Clorox, to boost air travel safety, cleanliness

Updated May 20, 2020; Posted May 20, 2020

Clorox Foundation to Donate \$5 Million to Coronavirus Caregivers in Partnership With Leading Public Health Organizations

DATE: September 6, 2020 | AUTO Connected Car News

AutoNation Offers Free Vehicle Sanitation to Teachers

DATE: September 11, 2020 | KYW-TV CBS (Plattsburgh, NY)

Philadelphia International Airport Using High Tech Sprayers to Sanitize High Touchpoints in Facilities

Clorox boosts sanitizer output amid coronavirus-driven demand

'Our people are working round the clock'



Uber @Uber - Jul 22
Uber is now @Clorox clean.

We've teamed up to bring disinfecting supplies to rides in the US. Help protect yourself and others—look for Clorox wipes on your next ride.

Uber is now  clean



Oakgrove Elementary, Battleboro

Clorox Canada Works With the Ontario Government and AdvantAge Ontario to Support Seniors

THE BIG QUESTION

For today, imagine you are the CGO (Chief Growth Officer) for your company and are tasked to identify the next predictable surprise.

Answer the following two questions with the first thing that comes to mind as CGO:

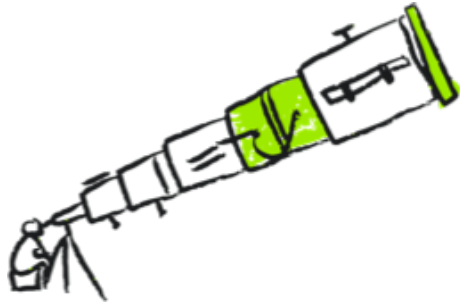
1. What's the most important issue or challenge you believe you will face due to the changing landscape?
2. What do you think predicting surprises could mean for you and your category?

5 Principles... A Reminder



1 SWITCH PERSPECTIVE

Look from the outside in to see the bigger picture



2 LOOK FURTHER

Take a longer view of time to see deeper patterns of change



3 ANTICIPATE VALUES

Understand people's shifting values to anticipate social change



4 SEE CONNECTIONS

Connect more dots to see a richer view of change



5 PREDICT SURPRISES

Take off the blinkers to reveal predictable surprises

FUTURES THINKING PRINCIPLE #1

SWITCH PERSPECTIVE

PEOPLE

tend to see the world from
their own perspective

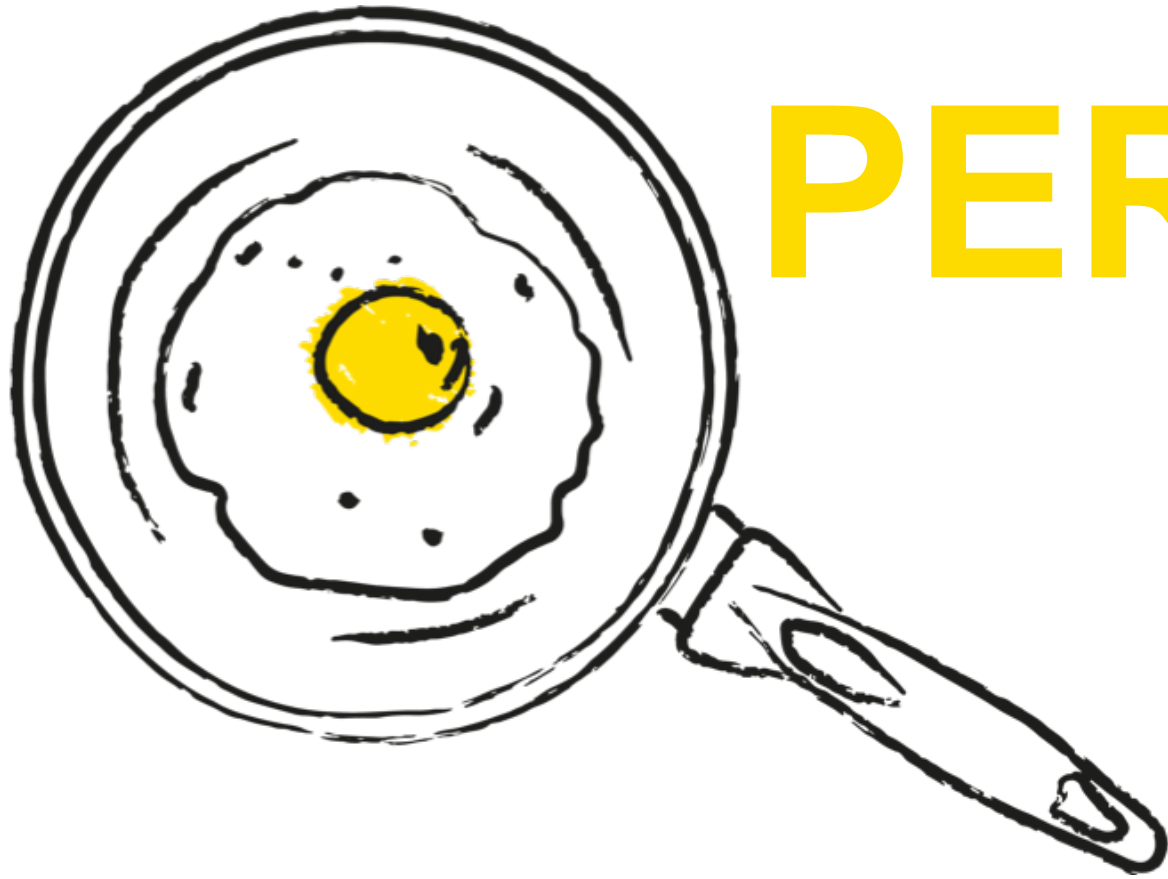
FUTURES THINKING

looks from the outside in
to see the bigger picture

STRATEGISTS

looks at the business as
its defined today

FUTURES THINKING PRINCIPLE #1



SWITCH PERSPECTIVE

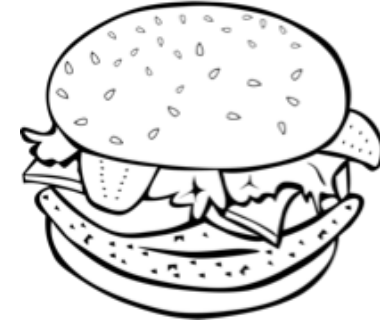
What's the best question?



The future of **clothes laundry**

★ The future of **washing**

The future of **home & garment care**



The future of **meat**

★ The future of **protein**

The future of **sustainable nutrition**

SWITCH PERSPECTIVE

EXERCISE

WORKING OUT THE QUESTION

PRINCIPLE #1

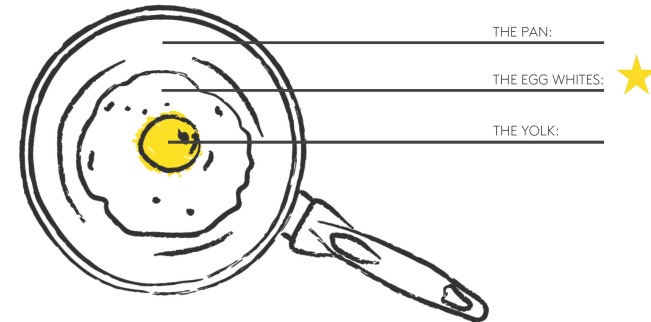
Look from the outside in to see the bigger picture

FUTURES THINKING PRINCIPLE #1

SWITCH PERSPECTIVE

Look from the outside in to see the bigger picture. In setting the problem it's really important to look more broadly, at changes in the wider world, but also to remember we need to keep focus – there's no one-size-fits-all solution here, but by remembering the pan you can make an informed decision about where your question should be... Thinking about the pan, the egg white,

and the yolk, write down the different questions you would ask about the future of your organization and industry for each level. Then align around the BIG QUESTION your company should focus on. One that looks broadly but is focused enough. So, what is the future of _____ ?



KANTAR

FUTURES THINKING PRINCIPLE #2

LOOK FURTHER

PEOPLE

are biased towards
the short term

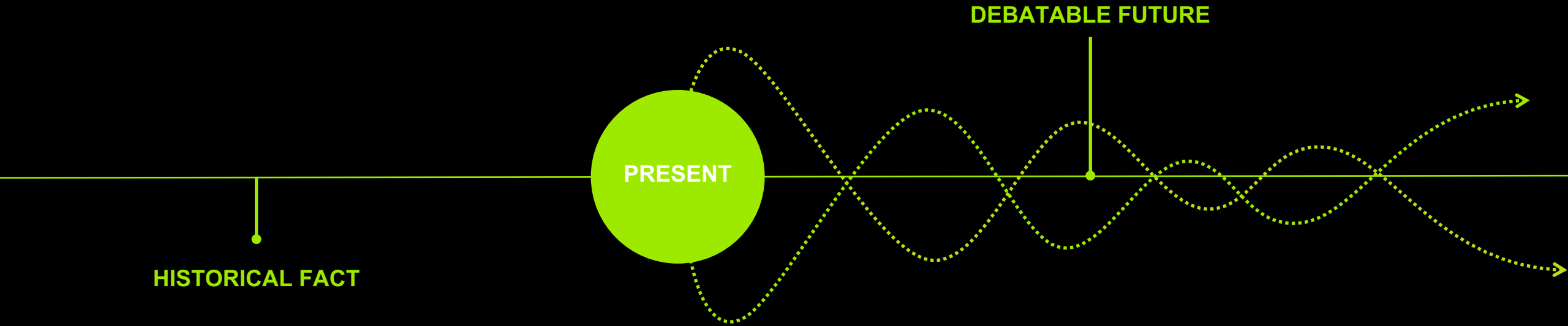
FUTURES THINKING

takes a longer view of time
to see deeper patterns
of change

STRATEGISTS

plan quarterly or
annually, in line with
business focus

We need to re-frame the way we think about time



3 Keys to building a great timeline

1.

Keep your time horizon relevant for your business

We often suggest 1.5 product innovation cycles for setting the right horizon.

2.

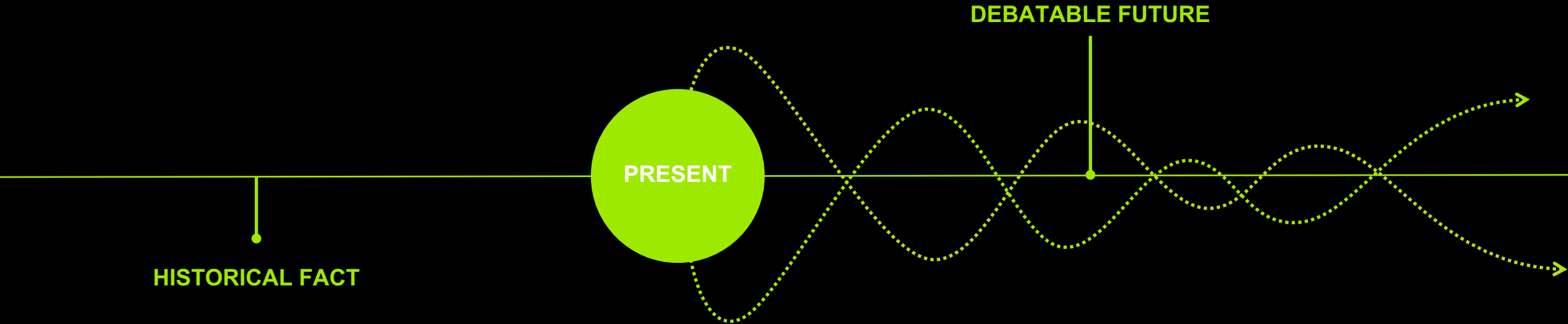
Respect the role that the past plays in the future

Looking at the past can help you identify recurring trends, cycles and align around the rate of change.

3.

The length of time that you look back and look forward is critically important

We suggest looking back twice as far as looking forward.



LOOK FURTHER EXERCISE

BUILDING A TIMELINE

Above the line = events in the sector

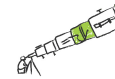
Below the line = events in the wider world

PRINCIPLE #2

Take a longer view of time to see deeper patterns of change

FUTURES THINKING PRINCIPLE #2

LOOK FURTHER



Take a longer view of time to see deeper patterns of change. With Futures Thinking, we look backwards in order to look forward. Our rule of thumb is to look back twice as far as we are looking forward to force a new view of time and understand the rate of change. We start by looking at historical facts and events. This provides a broad scope to account for all of the past events that have changed the industry you are working in, thus, allowing us to make more informed decisions moving forward. Once we've established this history, we can then do the fun stuff: using what we know has happened in the past, and what is happening today to project what is to

come. It's important to note that this exercise is about future possibilities not a future eventuality. We are looking for many moving parts from past, present and future make up this future possibility. Also keep in mind that looking solely inside the category when planning for the future would cause people to miss this. **So, for this exercise, build the timeline below by mapping out:**

- **Above the Timeline:** Events in your industry
- **Below the Timeline:** Events in the wider world



KANTAR

Key takeaways

1.

Discover the likely rate of change for your business and/or category

2.

Align on assumed future events and/or milestones

3.

Open a dialogue with your colleagues about change in the long term

FUTURES THINKING PRINCIPLE #3

ANTICIPATE VALUES

PEOPLE

underestimate the
power of values shifts
because we are part
of the shift

FUTURES THINKING

understands people's
shifting values to
anticipate social change

STRATEGISTS


think about
consumers today, not
values of tomorrow


REFRAMING “GENDER”

Moving from this...

2015

Look like a girl
Act like a lady
Think like a man
Work like a boss



#HappyWomensDay 

2007



2014



2006



2015



To this...



ANTICIPATE VALUES EXERCISE

ADDING VALUES

Now think about value shifts... what's really changed the course of history; what could come next?

PRINCIPLE #3

Understand people's shifting values to anticipate social change

FUTURES THINKING PRINCIPLE #3 ANTICIPATE VALUES



Understand people's shifting values to anticipate social change. As a rule of thumb, value shifts take more time to gain momentum – think about the journey of gender equality – think about how long it's taken for #metoo to become a movement in its own right. Now think about other value shifts. Ask what's really changed the course of history, and what could come next that could affect your industry? Capture these thoughts and add

them to the timeline you had already created with events for Principle #2 (LOOK FURTHER)

As a reminder, add value shifts this way:

- **Above the Timeline:** Events in your industry
- **Below the Timeline:** Events in the wider world



KANTAR

FUTURES THINKING PRINCIPLE #4

SEE CONNECTIONS

PEOPLE

see change in one
dimension

FUTURES THINKING

connects more dots to see
a richer view of change

STRATEGISTS

focus on one category of
change, either economics,
technological, etc.



INCREASING IMPORTANCE OF CULTURAL COMPETENCY

As the U.S. population becomes more diverse, the need for greater understanding and empathy of cultural context will become more important in ensuring quality of care and reducing existing health disparities.



MAINSTREAMING THE INTERNET OF THINGS

The physical world is becoming an information system. Everyday objects are becoming embedded with computing chips, sensors, actuators and networked connectivity.



FROM FEE-FOR-SERVICE TO FEE-FOR-OUTCOME

The Affordable Care Act has ushered in an era of value-based healthcare, as opposed to the outdated, volume-based “fee-for-service” model. This will lead to more innovative payment mechanisms and greater focus on positive patient outcomes.



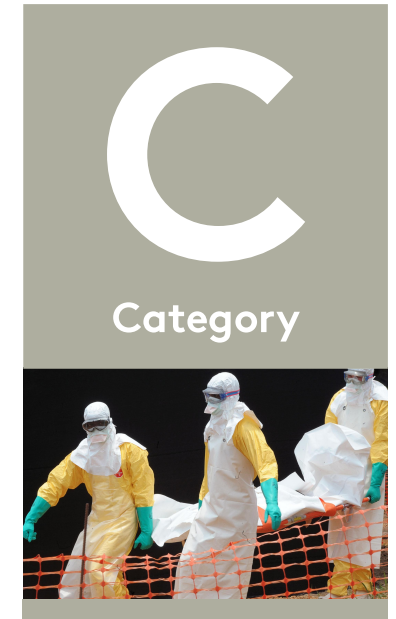
RIISING CONCERNS OVER TOXICITY

Concerns about chemical ingredients are increasing across a broad range of categories, from packaged food to personal care to home goods. Instead, consumers find reassurance and better health in naturals as the category continues to grow.



TENSIONS BETWEEN REGULATION AND INNOVATION

Concerns that regulation will stifle innovation in healthcare will continue as policymakers and regulatory bodies juggle the need to ensure safe and secure use, quality and effectiveness amid new advances in technologies and changes in healthcare delivery.



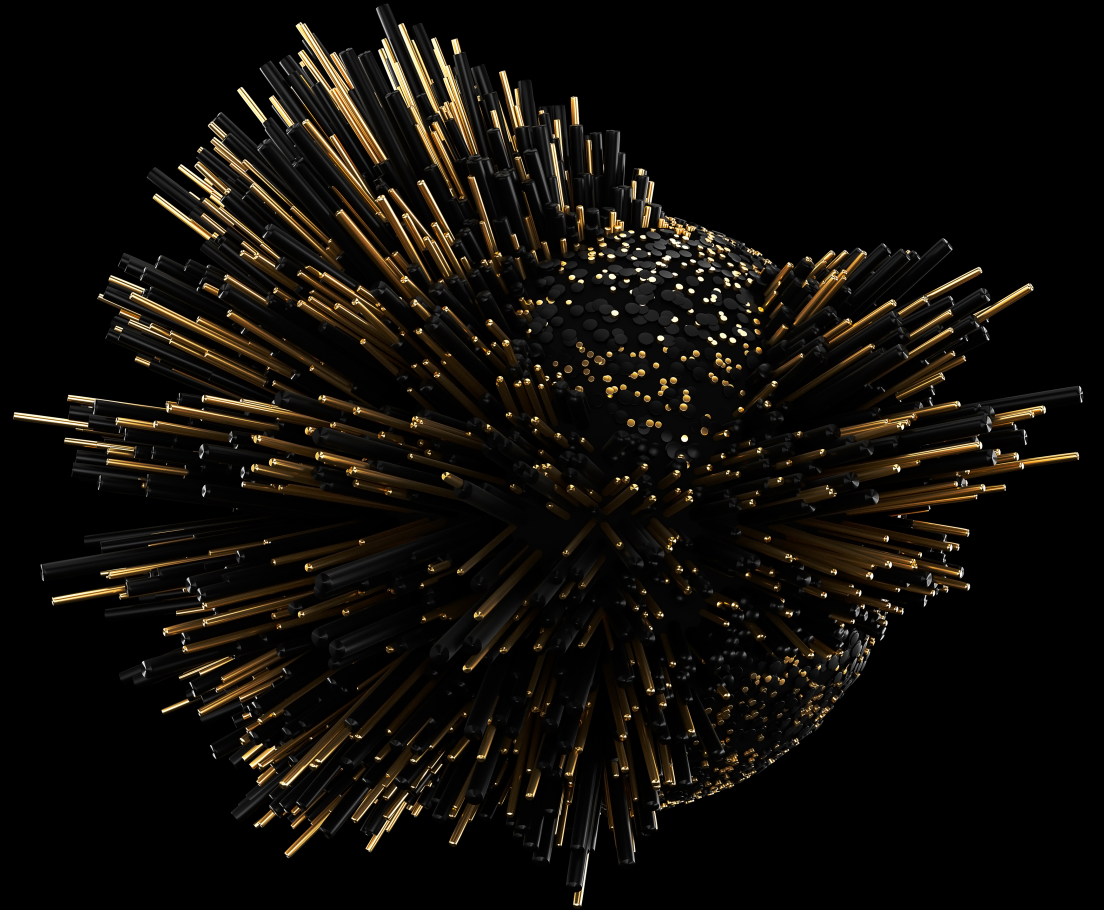
PUBLIC HEALTH THREAT FROM PANDEMIC CRISES

The proliferation of cross-border viruses will place growing pressures on public health officials and heighten the need for more coordinated action.

Why do we start scanning so broadly for drivers of change?

It's about the inter-relations, and the connections between them...

“How did we foresee
a global pandemic?”





Seeing Connections can have uncomfortable outcomes

By thinking deeply about change, you can see unexpected (and very powerful) future dynamics. These dynamics then form the core of your long-term perspective on where to play and how to win.

RISE OF SANITATION DETECTION AND SIGNALING

INCREASING IMPACT OF CLIMATE CHANGE

MAINSTREAMING OF NETWORKED CARE

GROWING IMPORTANCE OF POPULATION HEALTH

RISING CONCERNS OVER SUPERBACTERIA

TRACTION AND SPEED OF HEALTH MISINFORMATION

GROWTH IN ANTICIPATORY AND PREDICTIVE ANALYTICS

DENSIFICATION OF URBAN AREAS

PUBLIC HEALTH THREAT FROM PANDEMIC CRISIS



SEE CONNECTIONS EXERCISE

DRIVERS CLUSTERING

Review the drivers in your kits, pick a few that connect in interesting ways and capture the shift the combination creates

PRINCIPLE #4

Connect more dots to see a richer view of change

FUTURES THINKING PRINCIPLE #4 SEE CONNECTIONS



Connect more dots to see a richer view of change. By exploring the first three principles, you have already started to SEE CONNECTIONS between the different events in your pan, within your sector, within the wider world, and across people's values. Now, the next steps are to:

1. Review and familiarize yourself with the Drivers of Change we shared with you. Drivers of Change are designed to help map and explore the most essential changes and opportunities shaping the future. Notice that the drivers reflect a lot of the shifts you've already captured on your timeline.
2. Notice that our STEEP framework does not contain Category specific drivers. This was done intentionally. Given that you are an expert in your

category, take some time to create new drivers that are specific to your category/industry following the same format!

3. Next, think about how to find connections. Pick a few drivers that connect in interesting ways and in the context of your industry. Start simple. Pick one driver you're particularly interested in or passionate about. Then try to choose drivers from different domains within our framework that could connect with the driver you picked first. Add more drivers and see what stories emerge.
4. Finally, capture the BIG SHIFT that the combination of 5-10 drivers creates. Sum up the shift in a couple of pithy "from → to" sentences.

DRIVER 1	DRIVER 3	DRIVER 5
DRIVER 2	DRIVER 4	DRIVER 6

THE BIG SHIFT (FROM/TO)
Sum up the BIG SHIFT in a couple of pithy "from → to" sentences. What does this "future shift" look like; what's happening?

KANTAR

FUTURES THINKING PRINCIPLE #5

PREDICT SURPRISES

PEOPLE

tend to stick their heads in
the sand, assuming things
will go on as always

FUTURES THINKING

takes off the blinkers
to reveal
predictable surprises

STRATEGISTS

look at the players
changing, not the
landscape shifting

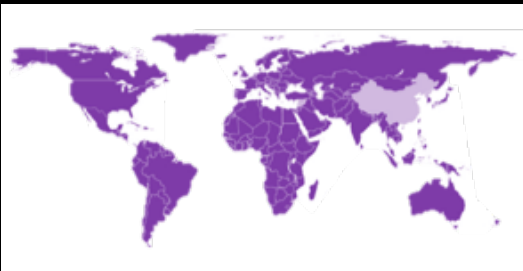
Should the video industry have seen this coming...



1985



2007



2017



2020

1998



2011



2018



**This reality was a predictable
surprise, a black elephant**

Examples of recent Predictable Surprises



**Tesla Overtaking GM
Market Cap**



Housing Bubble Burst



**GDPR and Privacy
Pushback**



**Climate Change
Impacting Daily Life**



Telemedicine



**2016 Election and the
Rise of Nationalism**



Pandemic Going Global

PREDICT SURPRISES EXERCISE

FUTURE WORLD

Using this worksheet, build the possible future world of your company – when you're comfortable with this, think about the actions you could take today.

PRINCIPLE 5

Take off the blinkers to reveal predictable surprises

FUTURES THINKING PRINCIPLE #5

PREDICT SURPRISES



Take off the blinkers to reveal predictable surprises. If you SWITCH PERSPECTIVE, LOOK FURTHER, ANTICIPATE VALUES, and SEE CONNECTIONS you can PREDICT SURPRISES. Using the BIG SHIFT you previously developed in Principle #4 (SEE CONNECTIONS), use the template below to build the possible future world for your company and think about the actions you could take today to predict or prepare for black elephants.

THE BIG SHIFT (FROM/TO)

Pull the statement you created for Principle #4 (SEE CONNECTIONS)

WHAT DO WE WANT TO ACHIEVE BY 2030?

WHERE ARE WE TODAY?

ACTIONS FOR TODAY

ACTIONS OVER NEXT 1-3 YEARS

ACTIONS OVER NEXT 3-5 YEARS

ACTING TODAY

What are some actions you could take today to protect your future business? What should we start, stop, and continue?

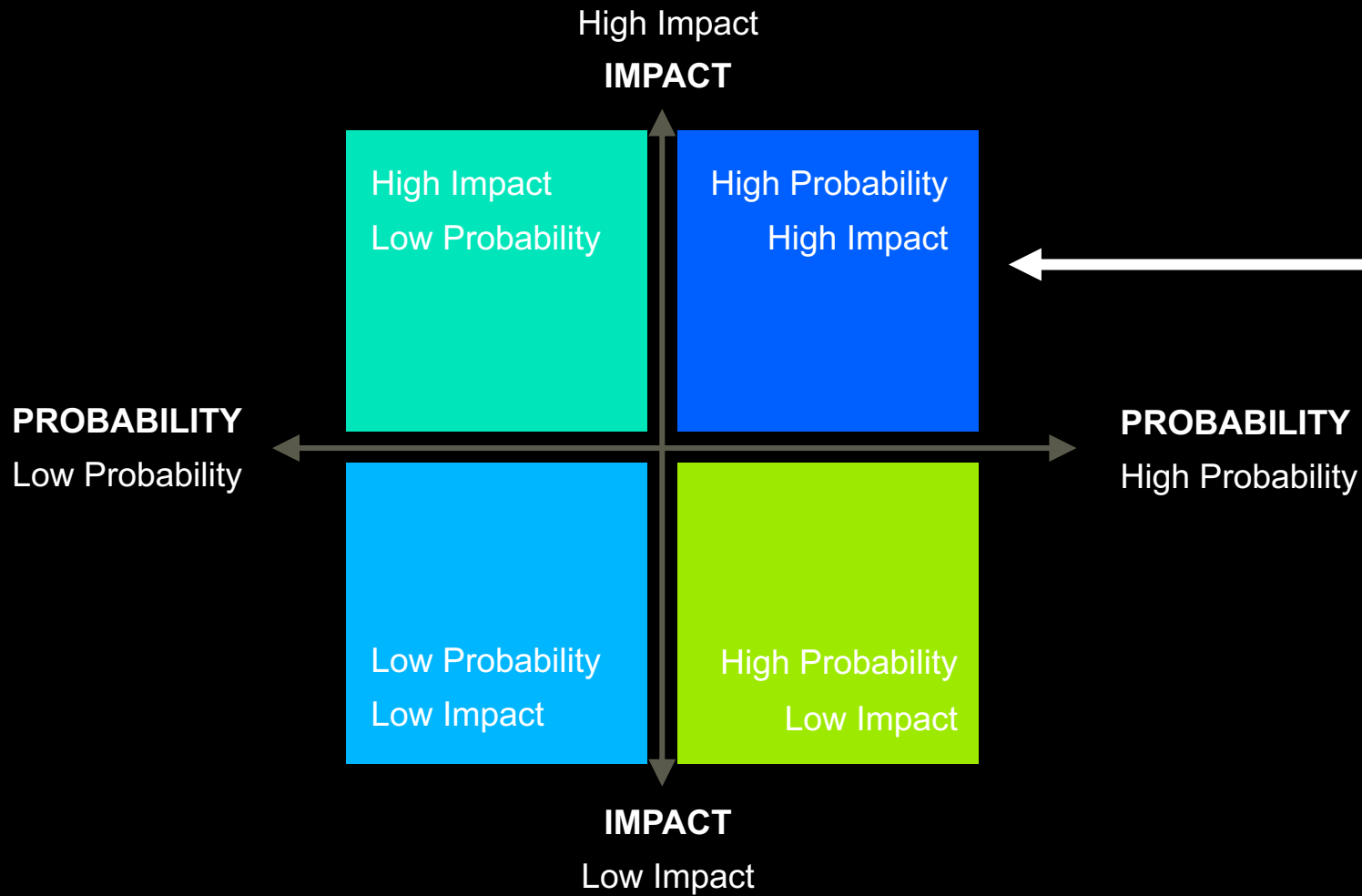
START:

STOP:

CONTINUE:

KANTAR

Planning for the Next Predictable Surprise



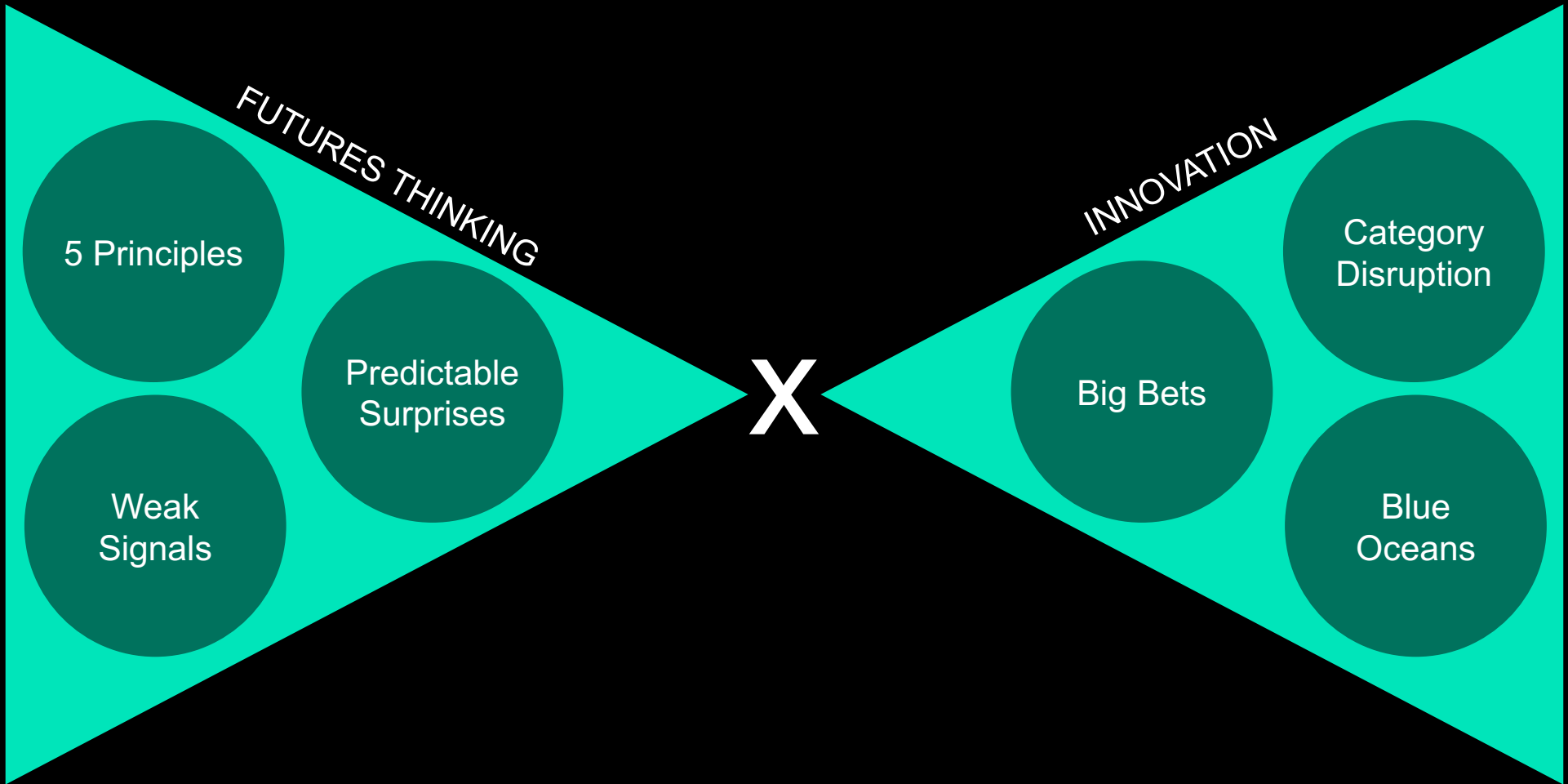
This is exactly where
Modern Day
Battleground ended up
for Clorox.

What ends up here for
you?

**REIMAGINE
WHAT'S
POSSIBLE**

**AND INNOVATE FOR
TOMORROW - TODAY.**

Futures Thinking ties directly to innovation strategy and category leadership



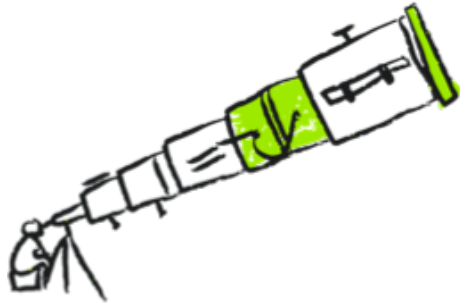
Using 5 Principles

We hope you can see your business and industry through fresh eyes, reimagine what's possible, and think differently about where growth lies – and what you should be doing to seize those future opportunities.



1 SWITCH PERSPECTIVE

Look from the outside in to see the bigger picture



2 LOOK FURTHER

Take a longer view of time to see deeper patterns of change



3 ANTICIPATE VALUES

Understand people's shifting values to anticipate social change



4 SEE CONNECTIONS

Connect more dots to see a richer view of change

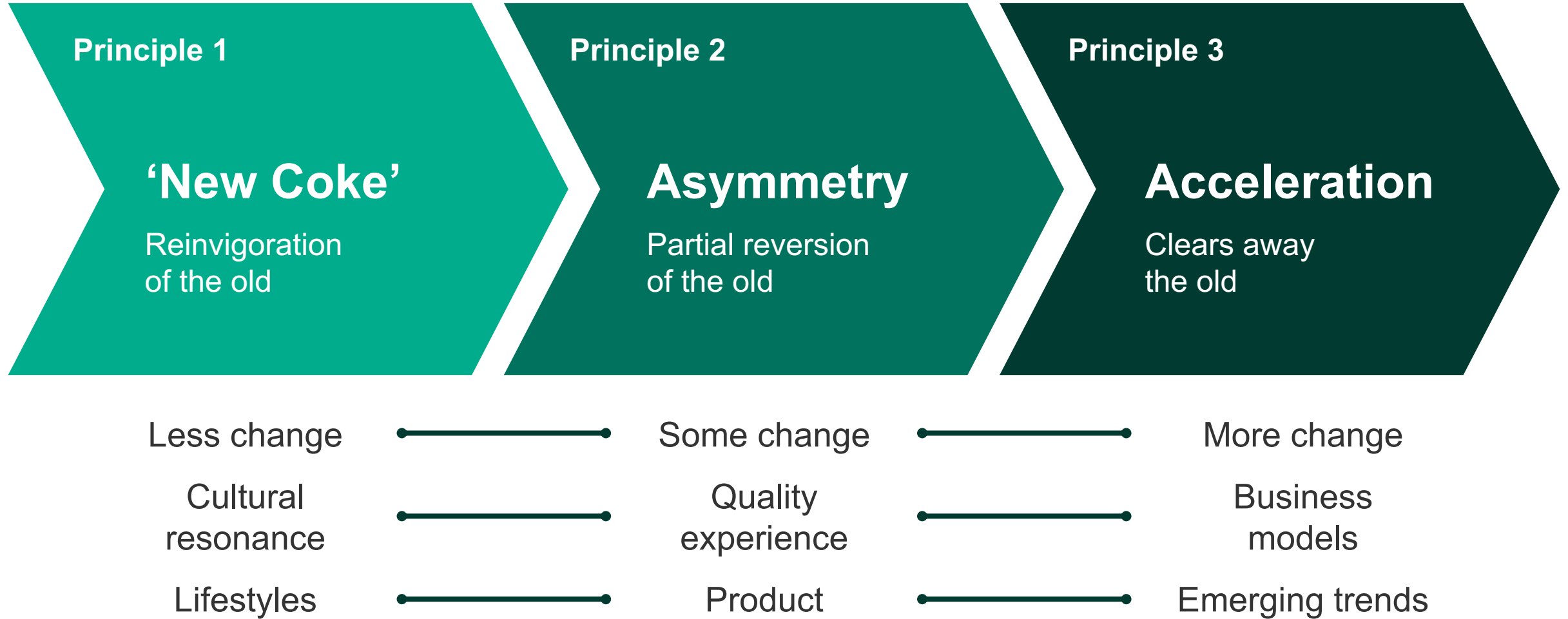


5 PREDICT SURPRISES

Take off the blinkers to reveal predictable surprises

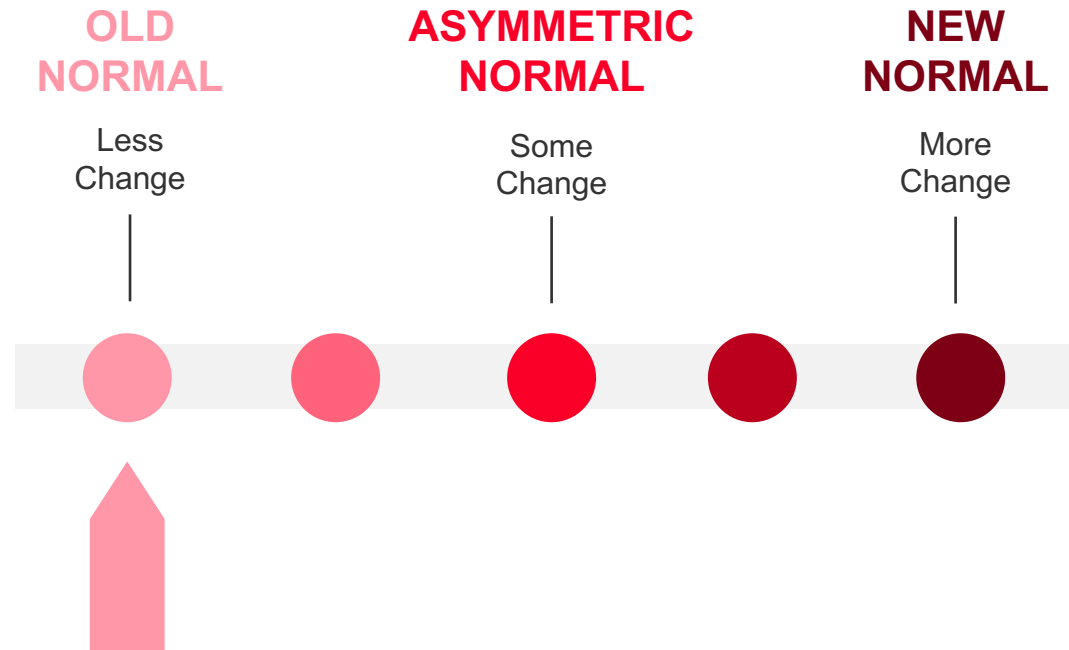
**WHAT WILL BE NEW AND
WHAT WILL NOT BE NEW?**

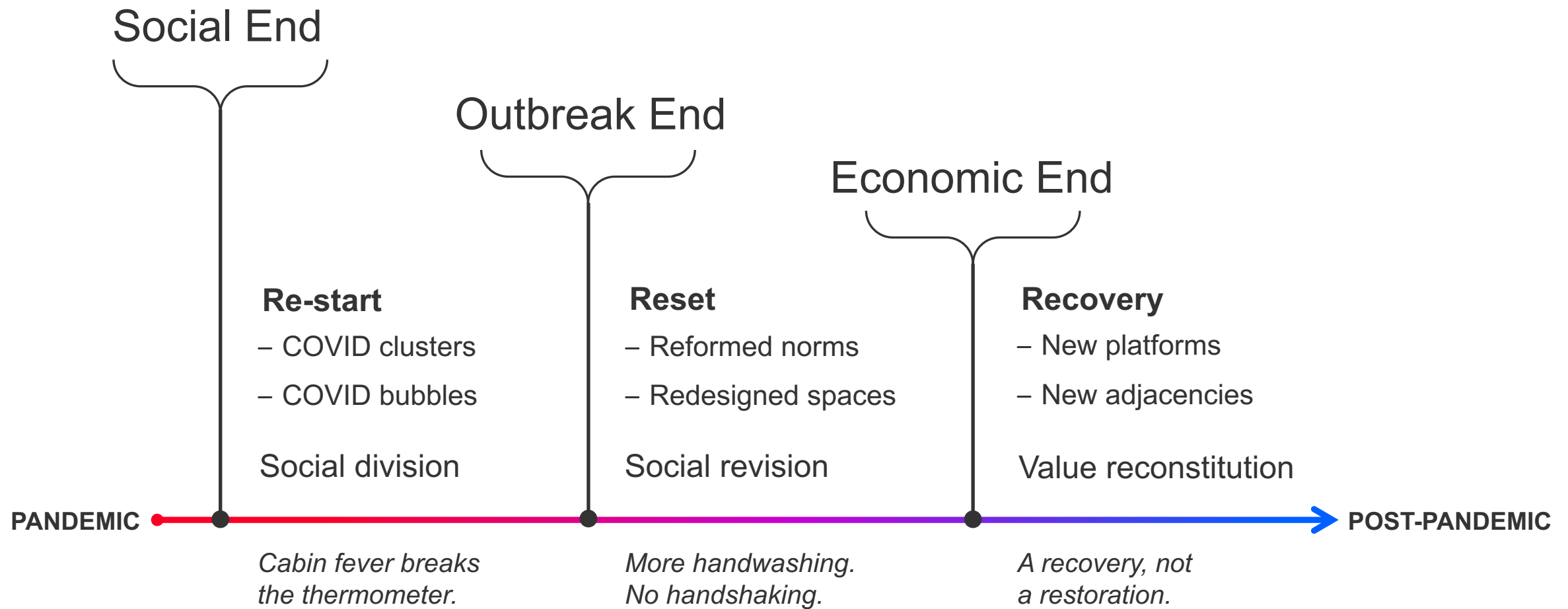
New or Not New Normal (post-disruption)



1. Human Scale

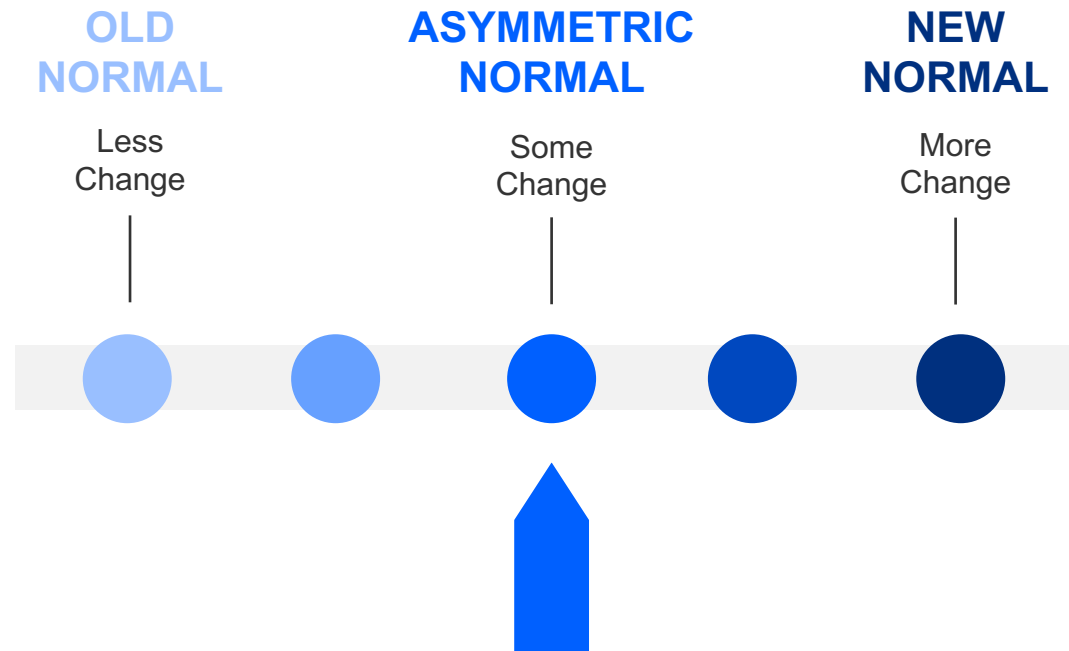
People will rush back to physical, social connection as soon as possible, even recklessly.





2. Risk Aversion

Consumers will spend and make big purchases, but only with more marketing investment.



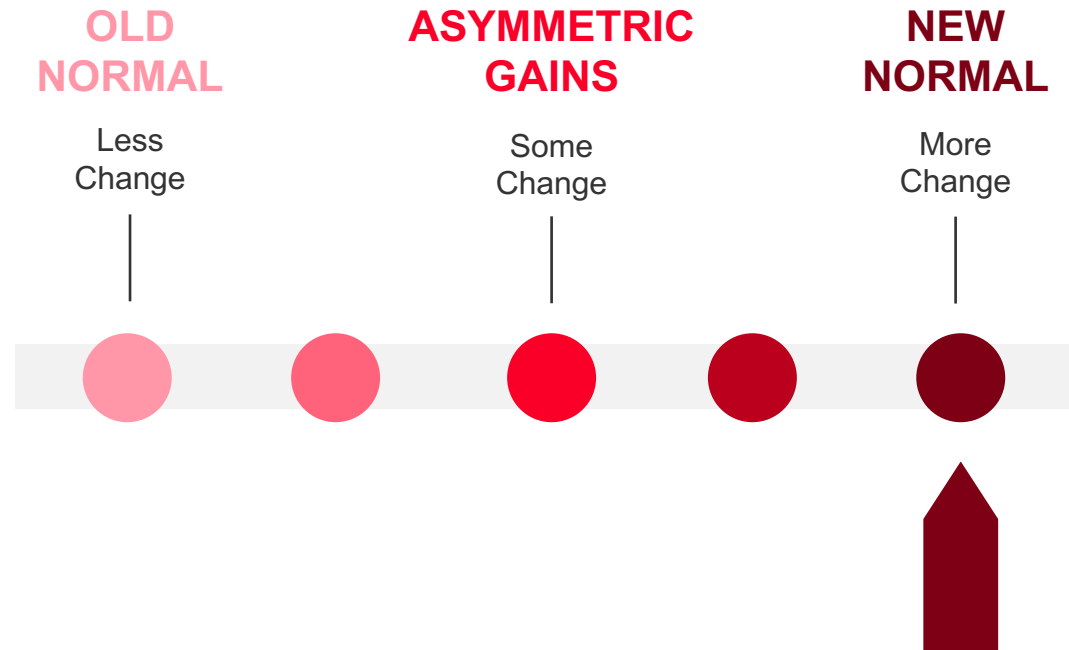
Scarring

NBER Working Paper Series: "Scarring Body and Mind: The Long-Term Belief-Scarring Effects of COVID," Julian Kozlowski, Laura Veldkamp, Venky Venkateswaran, June 29, 2020.
Working Paper 27439, <http://www.Nber.Org/papers/w27439>

"We model the economic effects of the COVID-19 crisis as a combination of a productivity decline and accelerated capital obsolescence ... In the first scenario, **GDP drops by about 10% in 2020, recovers gradually but does not go back to its previous trajectory. It persistently remains about 5% below the previous pre-COVID steady state.** The discounted value of the lost output is almost 10 times the 2020 drop and **belief revisions account for bulk of the losses** (almost 6 times the short-run effect). In the second scenario ... the relative importance of belief revisions remains the same."

3. Hygiene

Strong precautions around health and safety will be a permanent part of the marketplace.



TSA security checks **HYGIENE** is
the critical innovation that sends
an unmistakable **SIGNAL** it is safe
to **fly** **enter the marketplace**



Secure
Environment



Institutions **Brands**
in Control



Confidence
in Safety



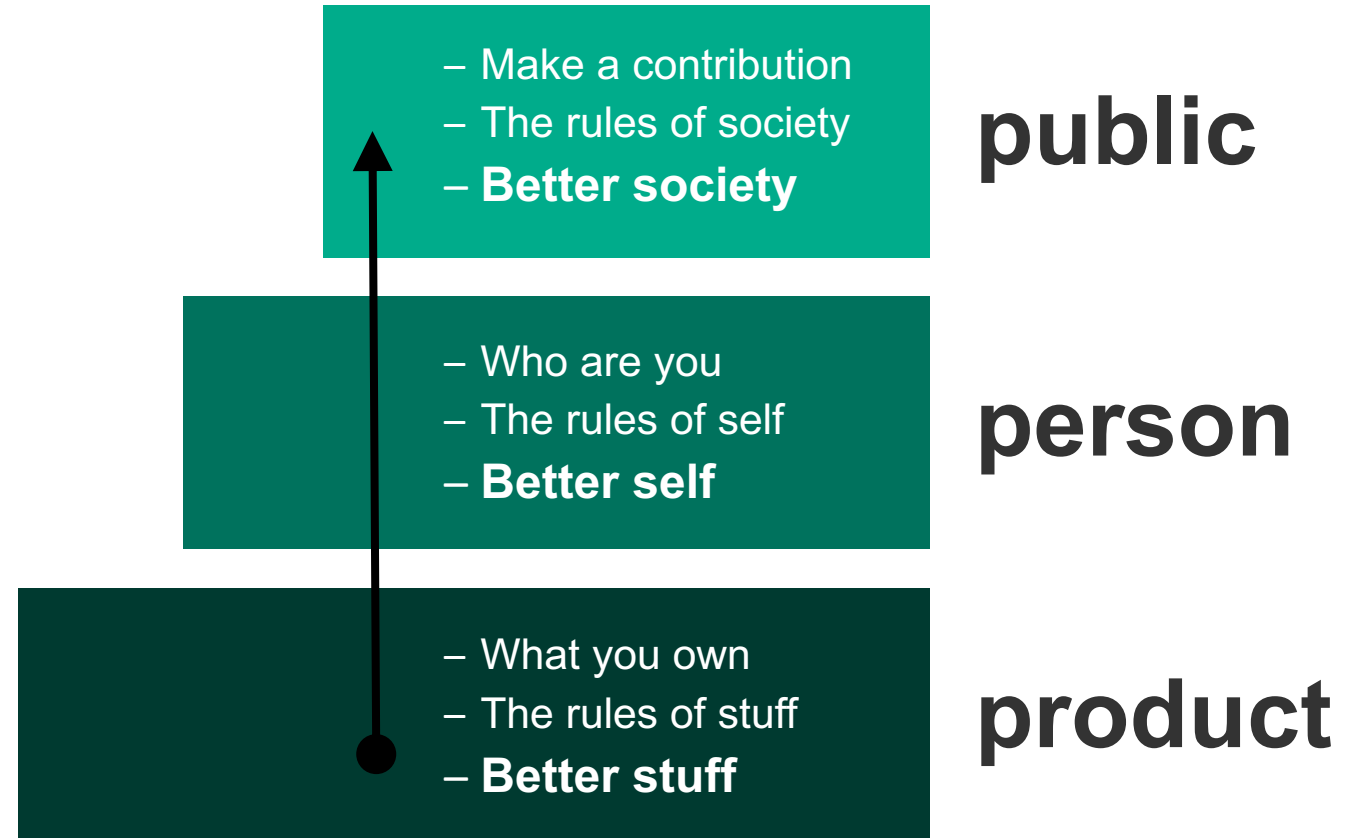
Human Scale

Risk Aversion

Hygiene

marketing eras

What is it that **brands** are expected to bring to the marketplace?



The background of the slide is a close-up, high-angle shot of a honeycomb structure. The hexagonal cells are illuminated from above, creating a strong sense of depth and texture. The light reflects off the edges of the cells, giving them a three-dimensional appearance. The overall color palette is warm, dominated by golden-brown and orange tones.

KANTAR

We look forward
to partnering
with you!

Don Abraham
Senior Partner
Don.Abraham@Kantar.com

J. Walker Smith
Chief Knowledge Officer
JWalker.Smith@kantar.com

Liana Gregorians
Head of Innovation Practice
Liana.Gregorians@kantar.com

Chris Carbone
Head of Futures Practice
Chris.Carbone@Kantar.com