

8 June 2020 bulletin

Coronavirus, communications and the built environment

#06 *Beyond hyperlocal content*

[ING's sixth](#) fortnightly intelligence publication focuses on urban localisation and the future of content. Previous bulletins have dedicated sections to [culture](#), [creativity](#), [collaboration](#) and [networking](#) as more search for ways to communicate and engage considered and meaningful messages. COVID-19 continues to impact on every aspect of the built environment. These bulletins provide brands, organisations, and cities a thermostat with which to [measure this change](#). [Let us know](#) how we can better collaborate on the shared rebuilding of our sector.

COMMUNICATIONS: OPPORTUNITY FOR QUALITY CONTENT

In May, the share of voice for COVID-19 related topics began to drop. The pandemic has held around 40 percent of trending topic share since March, but ING's tracking suggests world events and other conversations are gaining importance. This may be a strategic time for brands, organisations, and cities to revive stalled activities or invest in new content-led campaigns while there is both a content vacuum in certain areas and a growing appetite for alternative narratives. Journalists returning from furlough creates more opportunities for content. There is some optimism that the media will be more business-as-usual from summer onwards. As restrictions ease, photographers are returning to capture recent building completions. The first architectural building reviews may appear in the next month. Local publications – such as London's CityAM – are

also [returning to print](#), increasing the range of placement possibilities.

THE FUTURE OF CONTENT

Restrictions on movement created a condition of hyperlocal user generated content (UGC) which has only just begun to change. The first few weeks of the pandemic were dominated by content created in our homes – from sourdough feeding Instagram, multigenerational kitchen TikToks and bookshelves on Twitter – impacting on places like [Soho](#) in London and other highly captured urban locations in cities as diverse as New York City, Singapore, and Paris. With no-one to create content, they have effectively had a UGC-blackout, which may have long-term impact on their ability to attract investment and visitors. Other parts of cities – leafy suburbs – have fared better. The inclusion of suburbs more centrally in the visual representation of what the city is may have long-term impact on buying preferences. As lockdowns lift and people start to explore neighbourhoods and discover local coffee shops, delis and vegetable boxes, content will stay at the neighbourhood level. There is no doubt that suburbs which have worked on communicating an identity within the city will be better off. For those with local food, educational, cultural, and residential communities, that identity could be one key to brand resilience in the coming months and years. Some smaller cities like [Liverpool](#), Lyon or Ljubljana could use this as a strategic opportunity to invest in their online presence.

Expect more buy-local campaigns and a greater expectation for investors to partner or source locally. Global and national brands will still be relevant, but may find loyalty difficult without credible local content or knowledge.

The resilience, however, of national and international content and communications is being tested, particularly in the United States. Donald Trump's executive order aimed at Twitter follows it placing "fact check notices" against two of his tweets and designating another as glorifying violence. The order instructs his officials to re-examine a 1996 law granting social media companies immunity from being sued for content which appears on their platforms, or for removing content. This could impact on the US's long-term dominance over social media innovation. While it is likely to remain the number one or two producer of content for [most major cities around the world](#) in the near future, expect this to shift as cities increase their capacity to generate local content and diversify their access to capital markets.

A quarter of content on the Internet is English. The United Kingdom and the United States have long been the strongest partners in global media and communications, dominating the anglophone world. It remains to be seen whether the inward investment which is tied to strength of communications will suffer but the reputations of both are certainly tied to the ability to maintain a free press, a strong communications reputation and significant content production.

Understanding how content is changing is key to illustrating value. For many, experience of place outside an immediate neighbourhood is not possible beyond the outpouring of [content](#), updates and information across digital platforms. Scrutiny has increased, not necessarily because of distrust, but because we are wanting a sense of accuracy from the

content we're consuming. We may also have less capacity as [content fatigue](#) sets in.

Digital platforms are allowing content producers to experiment with [alternative formats](#) and reach wider audiences quicker. Representing how we're adapting and [recovering](#) can be inspiring and comforting, but has also highlighted [growing inequality](#) and [long-term structural challenges](#). We can expect divergence on this, with some content providers seeking [leadership](#) on [how to engage with more diverse voices](#) while others target even tighter demographics or interest groups. The workforce specialisation and management structures that have allowed organisations to boost productivity and scale may need more flexibility to expand opportunities for diverse interaction. Organisations may give staff time to sincerely engage with content outside what they may consider their core networks to be better positioned for change.

[Cities](#) are offering alternative experiences while restrictions are in place. [Helsinki](#), [Berlin](#) and [Taiwan](#) are using cultural soft-power to keep residents and potential tourists and businesses engaged while the most important piece of content – the city – remains inaccessible.

The V&A's [Pandemic Objects](#) demonstrates how context can give new meaning to the objects. Photography [documenting](#) the pandemic provides insight into [places](#) we cannot reach, showing our [desire to remember](#) what has happened so we may reflect on it in the future. The [physical city](#), as layers of content, will continue to be an important site of collective memory, inspiration and learning.

For architects, a greater demand for understanding context and producing responsive design has led to practices [envisioning the future](#) with speculative designs. Referencing local vernacular may no longer be sufficient if sustainable [placemaking](#) takes hold

and neighbourhood content shifts the narrative to supporting local. The role of architecture may, however, become more important in illustrating diverse local needs in a context of rapid global change.

The month-long [London Festival of Architecture](#) relaunched as a digital entity. Physical events are promised later in the season. Open House under new director Phin Harper has announced it will push ahead with a [physical festival](#) in September, while continuing to curate [digital short film tours](#) from residents of housing estates and built environment activities [for children](#) being home schooled. Expect digital content to increasingly augment physical event programming, originating a whole new industry of content creatives.

Fragmented markets may slow [business development](#) especially when [cities](#) and industries are [reopening](#) at different times. However, the cross-pollination of content and ideas may help [reinvent retail](#), establish [thought leaders](#), and reconnect people and places. Tailored strategic content is helping to revitalise businesses and reaffirm brands. [Established businesses](#) and [start-ups](#) alike need to be nimble and readily shift the content they output.

A trend for cultural content to be given away for free may, however, limit the production of quality content, undermining built environment recovery. Arts organisations globally have screened free concerts and [theatre programming](#), and as a proliferation of Instagram live events and Zoom talks replaced physical consumption of culture, independent artists, writers and creators have been tapped for talks or creative endeavours, many of which are unpaid. Messaging to help audiences recognise the value of the experiences being enjoyed, even if provided pro bono, may be needed to ensure creatives are rewarded. Government support [may also be required](#) to ensure richness of content is

sustained. Theatres planning to include social distancing as [part of the content experience](#) is important not only for reanimating the built environment but also creating content to help us make sense of change. They may also provide new ideas for repopulating buildings: one of London's biggest theatres may integrate technology to reopen [without social distancing](#).

BUILT ENVIRONMENT: INVESTING IN THE FUTURE

The future of the office has received [significant attention](#), however, for many work has always been distributed across the city: site visits, location studies, [face-to-face meetings](#) at home and beyond. We may see a [greater focus on flexible-working](#) as more studies suggest [productivity isn't affected](#). It will become increasingly important for property, cultural and city leaders to [fight for the future of our cities](#) to ensure cost-cutting doesn't dominate the debate. In the global sorting of millions of businesses, a prime physical location will likely remain a [key differentiator](#) even as digital assets become more important. [Disaggregated](#), [shared](#) or [virtual](#) offices all suggest a [long-term demand](#) for dedicated spaces to work from. Cities providing good management, [clean energy](#) and [quality public environments](#) accessible to a [younger](#) and more diverse demographic to thrive in will remain valuable places for businesses to locate. [Embracing density](#), [expanding networks](#), and investing in new [technology](#), may become increasingly important to sustaining three decades of '[urban renaissance](#)'. It is likely diverse cities will continue to be linked with [increased longevity](#) despite crisis spreading to the world's most connected places first. City networks may become more important, while organisations able to [share learning](#), pastoral support and talent across multiple cities at different states of crisis may be key for resilience. Global partnerships with strong local purpose may be particularly resilient.

While demand has reduced, the UK's Q2 office take up [compares with the 10-year average](#) and European public and private debt and equity markets are showing a [degree of stabilisation](#). As with [offices](#), any tightening of [housing](#) supply may sustain long-term confidence in real estate even if interest rates [dip below zero](#) in [some countries](#). However, [reconsidering how land is owned](#), the ability to [expand to intensify home-working](#), [safer housing](#), or a [more efficient distribution](#) of residential space, may require a broad range of new policy incentives and typology innovations. Schemes able to scale up or down at different stages of life may gain more focus; expect learnings from care homes and hospitals to impact on communal living designs.

Retaining an authentic diversity of place may require greater emphasis given a possible [consolidation of central asset ownership](#). Expect more local government innovation; coherent [metropolitan-level governments](#) will likely be in a better position to navigate education, health, land and infrastructure needs. However, localisation may encourage fragmented arrangements, which may slow down regeneration efforts. Cities able to develop solutions to specific needs with investors may be able to recover more quickly.

PLANNING FOR HYPERLOCALITY

Social media mentions of “shop local” since the beginning of March are up 35 percent from the previous three-month period as consumers look to support smaller, local businesses struggling through lockdown. Maintaining only essential travel is also keeping many closer to their front doors than usual; as outdoor markets and retailers begin to reopen, many consumers will maintain an affinity to their local areas, creating new opportunities for creating more polycentric or mixed use cities.

The possibility of [high-profile businesses closing city-centre offices](#) may free up space

for more locally based innovation, providing a new dynamism to major centres. As UK cities, like [Manchester](#), look ahead at recovery, expect a stronger focus on reconfiguring public transport away from central business areas to help people access local destinations more easily. Pavement widening and cycle lanes are part of strategies to promote local accessibility over intra- and inter-city movement; more activities will need to be distributed to neighbourhood levels. The need for local assets may see a shift in balance from NIMBY to [YIMBY](#) activism, providing unexpected opportunities to invest.

[Wuhan-style](#) lockdown measures or even more granular approaches may create rolling closures, which could further localise pandemic narratives for many. On a micro-level, people are re-assessing their limitations and priorities; more mixed-use may be key to reducing the need to travel as designers seek to reinvent the relationship between homes, [high streets](#), town centres and places of work. Homes may become increasingly productive workspaces, but expect the office to adapt, becoming a place to exchange ideas and be creative. While central office locations will be key for accessing and enabling diversity, retreat-style work locations may expand, with travel remaining an important aspect of challenging creative norms.

City centres won't disappear, but localisation may provide a healthy mixture of awareness and competition. Expect cities to further consolidate their long-standing status as the heart of global and local ecosystems of work, living, learning, culture and leisure.

GLOBAL: MOURNING AND RECOVERY

Vietnam's [early response](#) to COVID-19 shows the benefit of having well-rehearsed and coordinated crisis management. Like [Uganda](#), [Mongolia](#) and [Colombia](#), it is the only country with over a hundred cases without loss of life. Expect regularly updated crisis planning to be

public and key to future brand positioning.

Mourning may become a key part of recovery: Spain will pay tribute to lost ones for 10 days; the New York Times moved obituaries to its [cover](#); and there are [countless portraits](#) of dreams deferred or dissolved. A quarter of the world's population [celebrated a muted Eid](#), with most countries restricting festivities. The limited physical impact the pandemic has had on cities may make it harder to process emotional pain. Adding physical symbols or making changes to the built environment may be important to helping us make sense of the pain we may feel. For some it may be validation that it is okay to mourn.

There is growing data to suggest [women](#), [disenfranchised](#) and [BAME](#) communities are disproportionately affected by COVID-19. After far-right, conspiracy, and anti-vac groups rallied against lockdown conditions, Black Lives Matter activism after the tragic death of George Floyd has quickly become the most prominent during the pandemic. The built environment, as the world's most important generator and [store of wealth](#), will need to [show leadership](#) in the challenge of long-term structural inequality and be transparent about failings to develop and attract more diverse talent and ownership. The impact of [housing wealth and inheritance](#) on poverty will get more attention too; the most innovative real estate models will move ahead of any political change. Leading businesses are increasingly calling for recovery to be [clean and inclusive](#). [World Environment Day](#) will further encourage the sector to focus on the natural world, but there will be tension to achieve this without a price premium to avoid pricing out disadvantaged buyers.

A French study has suggested that [mild infection provides protection](#), while Germany's leading virologist thinks there may be [some existing immunity](#) from related viruses. A US scientist has suggested seeing COVID-19

as a [blood vessel disease](#) which may be an important step to treating it, while growing understanding of [how it is spread](#) may help limit transmission while easing lockdown conditions.

Montenegro has declared itself [free of the pandemic](#), and like many nations will open borders to countries with [low infection rates](#). [Greece](#) and [Spain](#), for example, will not allow travel from the UK. South Africa may be the last to open borders to tourists in [February 2021](#) although business travel has resumed. The UK is looking to better target [its blanket 14-day quarantine](#); many visitors may be required to quarantine when returning home, making travel even less appealing. South Korea has [reimposed some restrictions](#), suggesting messaging and [images](#) may need to help populations more positively navigate a new way of life. Germany's regional approach may see trade fares in Bavaria, [like EXPO Real](#), go ahead. A smaller show, [if viable](#), could provide opportunities for smaller agents to expand their role. [Paris Real Estate Week](#), organised by MIPIM, will take place in Paris in September. [Air bridges](#) may become an important short-term bilateral focus to overcome [quarantine measures](#); if successful they may signal new markets for expansion of goods and services.

Robots in [Estonia supermarkets](#) or [Rwanda treatment centres](#) are some of the latest examples of tech ambition, however, Europe's public sector alone may require an additional [4.9 million people](#) to govern the advance of digital technologies. Organisations with a depth of tech skills will be better positioned for change and government partnerships.

The risk of sovereign debt crises, particularly in resource-rich [poorer nations](#), may position China as the [most important trading nation](#) for most countries and the biggest [creditor nation](#). As the world considers the balancing of market recapitalisation, inequality, and climate change, we may need to find ways to better reward resource extraction in the same way that

innovation and ideas have become more readily prized in post-industrial centres. Supply-chains for the built environment may come under the same scrutiny as consumer goods.

GOVERNMENT: FROM REBALANCING TO SHARING

As [local governments](#) continue to close streets to lock-in climate change benefits, the government's reopening of [possibly more risky car showrooms](#) highlights the long-term misalignment between green policies in cities and national industrial growth frameworks. Many local governments will need to increase collaboration with each other and with the private sector to scale their ambitions, but may also benefit from more strategic messaging.

A support package for Transport for London includes a [financial and organisational review](#), which could increase the Department for Transport's understanding on how best to integrate public transport in recently formed UK [city regions](#). This may be particularly relevant where land-use is fragmented.

All [non-essential shops](#) can reopen from 15 June placing retail shares among the [FTSE's top performers](#), and illustrating retail's underlying value. [Service sector and places of worship](#) able to meet social distancing requirements may be able to open by 4 July. [Reducing social distancing from 2m to 1m](#), in line with [WHO guidelines](#), may open up more of the economy, and more quickly.

Treasury continues to take a close look at how planning could be used as a more effective tool for economic management. This could include the possibility of [zoning proposals](#) being included in summer legislative changes.

As in other countries, lifting lockdown restrictions remains contentious. Encouraging greater work-week flexibility or promoting [less touristed sites](#) may help reduce [crowding](#) at weekends as the [sunniest spring](#) advances into

summer, but also expand the government's 'levelling-up' agenda more widely.

A growing focus on social and spatial [equality](#) will place greater pressure on policy to prove fair distribution; any nation-first policy ambitions may be reconfigured as a desire for resilient and inclusive local economies.

MARKETS: BITE-SIZED RESILIENCE

Some ports in Asia have returned to being [fully operational](#), with European ports showing early signs of recovery. Low oil prices and lower demand is encouraging cargo chips to take [longer routes](#) around southern Africa to [avoid Suez Canal tolls](#), potentially increasing the carbon emissions of goods. Some reduction in air passenger traffic may bulk up [air cargo services](#), however, as with ships, smaller capacity planes are more easily adapted. Rising healthcare and home ownership costs in wealthy nations may have a [long-term impact on future earnings](#); if fertility continues to track downwards, we may have retire later in life or encourage immigration. [Quality public housing](#) projects may become more important in benchmarking long-term pension and health insurance vitality, and ensuring the built environment concentrates opportunities more widely. However, if they follow the market, resilience may mean smaller schemes, more able to adapt.

FINAL THOUGHTS

The self-penned [backstory to Netflix](#), in which the founder was told the streaming service would never work, may have insight for times of uncertainty: understand your market focus; re-assess what may be slowing the business; and 'nobody knows anything' may provide confidence when it is difficult to assess what might succeed. That may require wholesale change: a man who used to sell art to tourists in Johannesburg has reinvented himself as a [Zulu language teacher](#).

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