

COVID-19: 5 new human truths that experiences need to address

How organizations should respond to the never normal





COVID-19 has turned into a global crisis, evolving at unprecedented speed and scale. It is creating a universal imperative for governments and organizations to take immediate action to protect their people.

It is now the biggest global event—and challenge—of our lifetimes. As such, it is changing human attitudes and behaviors today and forcing organizations to respond. However, the need to respond won't end when the virus's immediate threat eventually recedes.

Imagine it's September. Things are back to normal. We can meet face to face. Travel is possible. Toilet paper is easy to buy. But things have changed. COVID-19 has forever changed the experience of being a customer, an employee, a citizen and a human. Expect to see behavior change at scale for some time to come.

What will have changed in the way we think? How will that affect the way we design, communicate, build and run the experiences that people need and want? The answers to these questions will lie in the way people react and how individuals, families and social groups—all sources of creative innovation—hack new ways to live. Every organization must become a listener—sharpening their sensitivity to signals in real time in order to respond immediately.

We are witnessing massive behavior change at a scale and speed that we've never seen before, sparked by fear, proselytized by social media, encouraged by government. Such change includes frequent handwashing, working from home and discouraging bad behavior such as toilet paper hoarding.

This goes way beyond “nudge” techniques, though some are being used, and extends to outright insistence that is either working naturally or enforced. Twitter even launched a handwashing emoji.¹

The science of behavior change had already become a known subject of study and an increasingly important tool for design over the past ten years. Leading companies had already instituted tools and practices to monitor, collect, analyze and act on a mix of digital surveys, behavioral signals, listening and sentiment.

Now, the need for these capabilities will become foundational to experience creation, and the speed at which companies can—and, increasingly must—respond to them will become sources of competitive advantage.

The formula is listen, pivot, learn, reassess.

The time to act is now. This document outlines the practical steps you should take to get started.



We see five major human implications to expect from people's behavior now, and next.

Each has deep **experience** implications for all organizations, not just businesses.

1

The cost of confidence

The erosion of confidence will make trust way more important than ever before. This will necessitate a “trust multiplier”—action that, to be effective, rebuilds trust quickly and credibly. Focus will be on confidence-building through every channel. Justifiable optimism will sell well. All of this may change the nature of what we regard as premium products and services.

2

The virtual century

The enforced shift during the worst of the pandemic to virtual working, consuming and socializing will fuel a massive and further shift to virtual activity for anything. Anything that can be done virtually will be. Winners will be those who test and explore all of the associated creative possibilities.

3

Every business is a health business

The concerns about health amplified during the crisis will not ebb after it is over. Rather, health will dominate. A health economy will emerge with opportunities for all to plug into. Every business will need to understand how it can be part of a new health ecosystem that will dominate citizen thinking.

4

Cocooning

Desire for cocooning, along with opportunities for those with creative strategies to enable it, will move center-stage for the same reason. Winners will be those who zero their sights on the home. At the height of the crisis, many—workers, especially—are spending more time at home. After, this pattern will endure with meaningfulness and comfort carrying a price premium.

5

The reinvention of authority

A reinvention of authority is likely after the effect of travel limitations, self-isolation and lockdown officially mandated by many governments. This is likely to be the trickiest of the five human implications as its impact could go one of two ways. If governments get their handling of the crisis broadly right, expect top-down control to be back in fashion; if not, the reverse. This is likely to vary by geography. What role will companies play?

The cost of confidence



**Pandemics are
real and can
deeply affect
our lives**



**“Black swan events are
something I need to factor into
everything moving forwards.
As the future is unknowable,
I don’t know what happens next
so I’d better have a Plan B.”**

- SENTIMENT

What's going on?

Deciding on what to do—especially in relation to large decisions such as holidays, where to live or work or major purchases—is becoming a more anxious process.

An explicit message of COVID-19 is that other people/places can carry an invisible threat. A second wave would deepen this issue and, indeed, all of the experience implications in this document.



Impact

People are postponing purchase decisions in many categories due to uncertainty. This will continue after the immediate threat dissipates. In China, sales of gold and silver, for example, crashed by 41.1 percent in January and February 2020, year on year.² A wait-and-see mentality will reign. It will affect many sectors.

Noise is a problem. There is a lot of information about COVID-19, and speculation — everyone has something to say, but should they say it? A mail from a hotel you stayed at ten years ago telling you how they are handling the situation is less than helpful. Those only virtue signalling in their brand communications about COVID-19 will pay a price.³ Some airlines during the crisis, for example, were still offering May/June flight deals without referencing uncertainty. In the face of difficult memes, Corona Beer's silence has been a model of good behavior.

The familiar will be more valuable. Established brands that handle the crisis well will rise in stature and value. Risk will be less tolerable to most people. New social circles may arise based on attitudes to risk—for example, some people may prefer to socialize with others who share the same cautious or intrepid attitudes. Brands need to take note of these affiliations and decide where they stand. Insurance—both with a small and big 'i' – will be very important, but only when it is trusted to really deliver.

Individualism may rise with more people adopting a look-after-yourself-first policy. Trust in people you cannot see on a daily basis should not be assumed, and those wanting to build trust in this context will have to work harder to do so. Conversely the community response to the pandemic will be remembered as a critical way of flattening its rise, and aspects of it will be associated with shared joy—notably, Italy's daily ritual of balcony music during its national lockdown.

“The rules we’ve lived by won’t all apply.”

- Astra Taylor, filmmaker and author of *Democracy May Not Exist, but We'll Miss It When It's Gone*, as quoted in Politico.⁴

How to respond

Brands will need to focus on reassurance and confidence-building. Companies must consider “Cost of Confidence” — the investment needed to provide customers with reassurance. Within this context, factors will vary by product or service but might include cleanliness, timeliness or ethical sourcing.

NOW

- **Run an end-to-end Customer Experience Audit:**
Create a remedial plan based on your audit findings.
- **Roadmap the need for your products and services, now and next:** Use Personas and Journeys to define how this plays out during the shutdown and immediately after. Determine where reassurance will be needed that a service is reliable and safe. Establish how you will stay in contact with customers who may become more irregular for the time being. Explore where demand might surge.
- **Remodel marketing with multi-disciplinary SWAT teams:** Rethink marketing strategy, sales channels and spend based on new assumptions. Resize budgets and optimize your marketing op model.

NEXT

- **Identify new opportunities as normal life resumes:**
Explore and define how you can expand your core products, services and experiences to fit with the new normal.
- **Accelerate your experience reaction time:**
Address how you take a nimble approach for unforeseen events like this. Move to a Living Business model.
- **Assess the new Cost of Confidence for your product/service:** Price will be very sensitive to trust.
- **Appreciate how the nature of premium will change:**
Understand where you should be on the new spectrum.

The virtual century



The sudden acceleration of a 25-year-old trend



“If I can do it online, **I will.**”

- SENTIMENT

What's going on?

The known tech-enabled trend towards more virtual experiences is rocketing ahead for both employees and customers.

Already, an uplift in use of, and investment in, virtual and augmented reality has been tipped as a likely after-effect of the COVID-19 pandemic.⁵ The shift towards virtual will affect ways of communicating across learning, working, transacting and consuming. This will affect everyone.

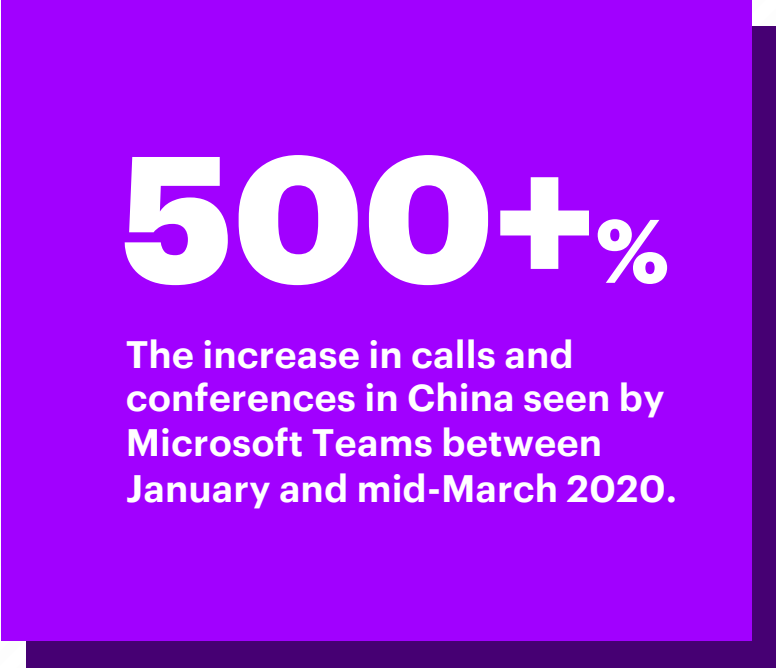


Impact

Already clear is that many users yet to adopt digital fully are now having to. COVID-19 is the catalyst now permanently shifting the laggards online and having made the investment in effort and learned new habits and interfaces, many will not go back.

It is more important than ever to streamline the hurdles of going virtual for all sorts of experiences—banking, curbside collection, online shopping. For retail, capacity constraints are a real issue—the result of the “digital shelf” not being ready yet for this level of demand because companies have repeatedly deferred prioritization of [full-scale eCommerce](#). There is still much to learn about in-store placement in the digital environment across many categories. On top of that, with last mile delivery a lynchpin of any online shopping brand, the question is: how much can you control the experience?

Some, maybe many, will feel discomfort at being virtual. Home working is not a habit for the majority. Not everyone will work virtually—for example farmers, delivery drivers and factory workers. Use of video can be uncomfortable with awkward distractions — kids in the background, dogs barking or bad hair days. But it is growing, fast. Microsoft Teams saw a 500+ percent increase in calls and conferences in China between January and mid-March⁶. Not everyone is equipped with the right technology to participate virtually. People are improvising, fast, for example using their ironing board as a computer stand. There may also be a generational virtual gap or divide. Either way, [bringing your whole self](#) to video-work will be a crucial skill not all can master quickly.



500+%

The increase in calls and conferences in China seen by Microsoft Teams between January and mid-March 2020.

Impact

Broadband and 5G will be life-essential for most after its utility was tested, hard, at the height of the pandemic when the world started to quarantine en masse. On just one day in mid-March, internet use in locked down Italy surged by 30 percent.⁷ Disney's decision to stream Frozen 2 three months early and Universal putting its film releases onto Sky TV underlines the central role of entertainment, and it will now carry higher market value. In China, usage of digital gaming, short video apps and live stream fitness classes rose sharply in February.⁸

Companies in many sectors will seek to use entertainment ideas, norms and expertise to transform virtual experiences. Virtual startups or products may catapult into the public consciousness and unlock new business opportunities. **Companies that are able to adapt to and utilize new virtual tools and models will achieve competitive advantages, both short and long term.** In China ZTE and China Telecoms designed a 5G-powered system enabling remote consultations and diagnoses of COVID-19.⁹

Some will embrace being more virtual for reasons other than work—to stay in contact with family, for example, or for healthcare and education. Italy's Istituto Europeo di Design (IED), Austria's University of Innsbruck and dozens of US institutions including Harvard University are among the many to suspend in-person lessons and switch to digital learning.¹⁰

One paradox is that while we're self-isolating and studying/working remotely, **many of us are rediscovering social ties—sometimes with more people than before.** People are participating in virtual gigs, drinks and dinner parties, more calls to friends and family, and sharing more personal stories at the beginning of each work video call.¹¹ Could “social distancing” lead to a different more regular “social intimacy”? People will naturally turn to existing social platforms to satisfy this most basic of human needs.

A craving for “real” will also build, however — fueled by an explosion of culture and activity when greater freedom and opportunities for fun return as restrictions are finally lifted. Conversely, the value and notion of “real” may shift or change dramatically. Might “virtual” content or experiences – virtual arts, for example, or virtual commerce—increase in value over physical? Could virtual “routines”—exercising virtually, for example—develop supplementing physical routines, such as gym visits? At the peak of the epidemic in Italy, yoga classes have gone online and Google and Facebook moved fast to enable mass demand for this mode of virtual interaction at scale.

How to respond

Companies that consider how their virtual experiences might not just connect individuals with products but also with people — and enable them to ask for, offer or provide help to/from others — will create virtual connections and communities with a real impact likely to endure. Virtualize your experiences and means of delivery wherever possible but don't write off "real". Think about new experiences and spaces that are not bound by the limitations of "real" in the physical sense, and about how virtual and real experiences coexist and complement one another. Make a distinction between functional and deeper human needs—markets for the latter will emerge over time, the former will drive demand now.

NOW

- **Run a Content Audit Assessment:** Review assets that can be reappropriated or activated for virtual usage and identify 3D assets such as digital doubles (virtual replicas of people) for creative development and content creation.
- **Adapt your Channel Strategy:** Immediately redeploy/train offline customer support to online — make retail sales assistants available through chat, Microsoft Teams or Zoom.
- **Shift customer connections online:** Identify and deploy virtual platforms to connect customers with real-life experts, places and events. Think how you create social trust in people who meet virtually.
- **Collaborate virtually:** Consider training requirements and new hardware and software requirements to support new ways of collaborating.
- **Redefine the last mile:** Assess the experience and understand how you can control it from a brand perspective.

NEXT

- **Prepare a post COVID-19 strategy:** Define your business strategy for when customers come back out to play. Think pop-up activities and rapid support to other experiences, like festivals. Rethink your service as entertainment. Consider how to create and deliver the content.
- **Develop immersive strategies:** Reimagine virtual communications, commerce and brand experiences that leverage social and other AR/VR/web platforms for engagement and delivery.
- **Invest in augmented/virtual reality and spaces:** Understand how gaming works and invest in games experts. Do not assume that everyone will be comfortable, so develop transition strategies.

Every business is a **health** business



**Health is now
an everyday
preoccupation
beyond
anything we
have seen**

**“I have to look after my
(and my family’s) health
as a priority.”**

- SENTIMENT

What's going on?

People are concluding that they cannot rely on existing health structures but, nonetheless, want all the help they can get, in every aspect of their lives.

Health experiences will be in demand, and vice versa health should be considered in every experience.



Impact

Individual and government health spending will rise, permanently. Employees will also look to employers for advice and guidance and care.

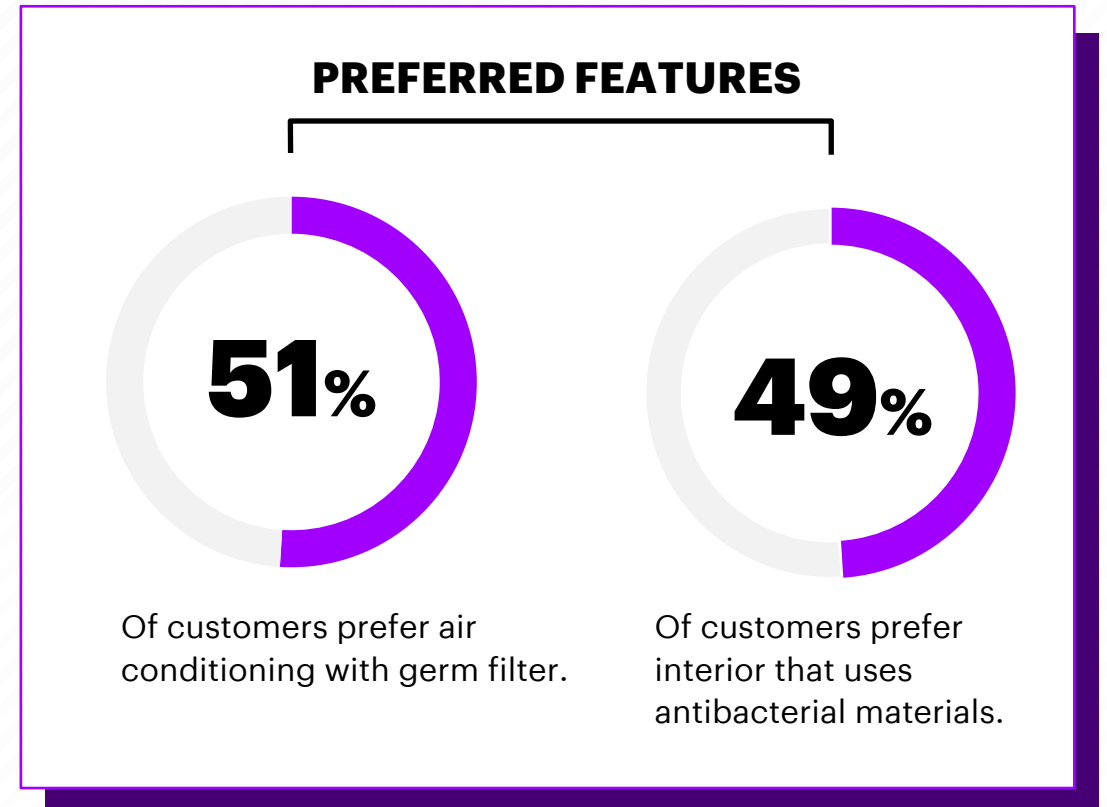
Those in non-permanent jobs may feel seriously disadvantaged. The gig economy, which in the UK accounts for one third of the active workforce, will look less attractive to workers, yet may be more attractive to organizations for cost reasons. The exact nature of this outcome will vary depending on local health systems and how well they respond to COVID-19.

Cleanliness is becoming a preoccupation likely to stay—along with sanitizers remaining a daily way of life. Already, many things are being repurposed. In the UK, Best Western was among hotel chains to suggest they could repurpose as temporary hospitals.¹²

Health-related features are becoming **must-haves**

A new survey found that a healthy configuration is now the top consideration for customers looking to buy a new car in China.

At 69 percent, respondents consider this more important than other considerations such as vehicle safety (64 percent) and quality (63 percent), comfort (56 percent) and price (51 percent).¹³



How to respond

Every business needs to be a health business in one way or another (that includes mental health). Almost every experience, product and service will be reassessed by people according to the extent to which it either enhances or diminishes their health. This mental process may be overt or subconscious, but it will apply to everything. This will create opportunities for companies to move into spaces adjacent to their core business to deliver/be part of a health ecosystem. Hotels, for example, should ramp up their health offering in every aspect of their experience—such as by offering healthier food, sleep tips, cleanliness reports, healthier locations.

But there will be challenges for those who simply can't participate. And charlatans—companies attempting to cash in on the new health ecosystem without having the trust, credibility or legitimate value-added product or benefits to do so—will be rapidly exposed.

NOW

- **Run an Experience Health Check:** Understand customer/employee concerns and manage/eliminate them. Every business needs to act responsibly right now.
- **System design for current needs:** Evolve your proposition for people's shifting demands. For example, following WHO's advice to pay contactless to reduce potential viral spread via cash and shops closing, ¹⁴ the UK cash usage halved. ¹⁵ Now, the upper limit of cashless payments is being raised to £45. ¹⁶
- **Run an Innovation Workshop to rapidly innovate your offering:** Define if and how your company can move production into an adjacency. For example, LVMH set a standard by quickly converting production of luxury goods to hand sanitizer. AB InBev is also doing so, making hand sanitizer from waste alcohol—a great circular economy long-term play. ¹⁷ Meanwhile, Formula 1 teams refocused their engineering capabilities on making ventilators. ¹⁸

NEXT

- **Identify health economy white space:** Consider what role your product/service can play in the health economy. Build this into the brand as either a core part of it or a part of the promise.
- **Evaluate health economy white space by sector:** Conversely, realistically assess how healthy your product/service is. Understand how a permanent shift in public attitudes will interrogate/challenge your supply chain, manufacturing, and communications. Imagine how your sector could play a role in health.
- **Seek new value generation:** Run a virtual workshop to unearth how your business can create value around health and the post-COVID-19 reality of "democratized health".

Cocooning



The retreat to a safe space

“Home is where the
threat is least and I am
safest...”

- SENTIMENT

What's going on?

Everyone is being told to self-isolate.
That means a return en masse to home as
the epicenter of life and experience.



Impact

There will be a rise in the proportion of home spending—on the home and made at home. Comfort will be a major growth area, as will safety-related products—technology, especially. Health@home will boom.

People will stay more local. As a result, trust will work more radially from local outwards but there will be tension between individual vs. community needs. It is probable that this will entrench existing mindsets about local vs. global, and this too will be a tension that needs to be catered for and understood.

Intergenerational relationships may blossom. The swift emergence of “caremongering”—a new word for looking after your neighbours but also those further away—which emerged in Canada then quickly spread to the UK, is unlikely to rapidly go away.¹⁹ Connectivity from home will skyrocket as people seek to reach out to friends and loved ones. Phones are for calls again. Intimate and connected experiences from commercial organizations will be premium, but orchestration will need sensitive handling of data.

There will be a probable rise in autonomous technology—next generation drones and other devices. In China, robots were used during the pandemic to clean and patrol the streets of Shanghai.²⁰

How to respond

Watch what is happening in homes all over the world. Thrown into a new social context, humans are creatively responding everywhere. Ensure you are able to capture and respond to this new melting pot of experience innovation. Be wary of pushing globalization or anything that sounds too much like it. The closer to home products are made, or which feel part of the local fabric, the safer they might seem. But be aware that some people will thirst for connection with the unfamiliar.

NOW

- **Create a Scaling Roadmap:** Plan how to unlock capacity at scale to serve homes so that service shutdown is unthinkable.
- **Change channels:** Immediately shift all delivery/marketing channels to focus on the home and messaging around it. Accelerate digital transformation and eCommerce.
- **Draw together customer experience and employee experience:** Incentivize those like call centre staff and delivery drivers who are in most frequent contact with customers to monitor and report on customer behaviour through Customer Story Enablement.
- **Run a Community Empowerment Campaign:** Identify how your brand can promote your customers and their community, then deploy your brand to do so. This means focusing less, for now, on getting customers to promote your brand.

NEXT

- **Upscale the importance of local:** Angle products and services to be part of the domestic scene. Get into the business of comfort blankets. Coming out of the crisis, local will be more important than ever.
- **Invest in household innovation research:** Observe and build a case book of how households are innovating. Define what new mindsets might appear in the [Future Home](#).
- **Prioritize transparency:** Embed transparency about where your products come from and how they are made as transparency will also be business-critical coming out of the crisis.

The reinvention of authority



Get it right and governments will be seen to have been effective ...
And many brands will have to really rethink what they are for

“We need to do what we are told: it is in our best interest. But I want to see companies do the right thing.”

- SENTIMENT

What's going on?

We are dependent on experts (now back in fashion) and strong government recommendation and executive powers to resolve it for now, backed by citizen compliance. China has issued a mandatory app that tracks quarantined citizens.²¹ In Singapore, a similar initiative is opt-in. France, meanwhile, is heavily policing social distancing. This lends real weight to central authority, which in many markets has been eroded recently in popular culture. In some cases, companies are taking on the role of authority. Faced with panic buying, supermarkets in the UK introduced special hours for elderly shoppers after restocking, and policed limits on customers.

Though the virus itself doesn't discriminate, there will be widely varying outcomes—across households and geographically. While some will fail financially or load with debt, some will continue as close to normal as possible. While some will be unable to home-educate their children, others will succeed with ease. Post-crisis, memories will be raw.

THE BIG RESET

It appears that no-one is to blame for this crisis, and that everyone has to fix it. This makes COVID-19 a crisis unlike any other in living memory and it is likely to herald a global reset of the way authority is meant to behave. That affects brands, and issues that straddle politics and corporations like sustainability.

Also likely to be reset is what being part of a society and community means—in terms of treating others with kindness, having greater patience even when unprecedented stresses create shorter fuses, making decisions for the greater good, and going out of one's way to help others. In short, the pandemic is testing our humanity and values.

Impact

The legacy effect on the sustainability debate will be profound. Can climate activists achieve their goals more swiftly now? When we realize what we can easily live and work without, activities such as long-distance flights or excessive consumption of things that are harmful to the environment will be assessed more closely and, probably, scorned much more. The social pressure to act and live responsibly will grow significantly. In addition, over the months that the pandemic dominates, we are developing new habits and tools that are already allowing us to conduct work and life in more environmentally sustainable ways. In many areas of life, people will be reluctant to go back to the old ways.

It will be interesting to see if, among the majority of customers locked down who have been forced to think for many weeks about their priorities, there is an accelerated shift to “conscious consumption”—buying only what matters and what they really need. Will life’s little luxuries rebound fiercely as everyday life resumes? Or will luxury be redefined?

A culture may emerge that’s far more sensitive to ostentatious displays of exclusivity. Brands now trading off luxury will face a choice. Should they embrace and communicate meaningful values that benefit the greater society? Or should they become an “invisible luxury” brand that eschews materialistic ostentation in favor of discreet experiences, for example, or relationships, and understated signifiers. This would not just change what these brands sell, but how they market and sell it.

Greater acceptance for the role of government and companies in society, and the importance of collective behavior, may occur. If this combination is seen to combat the virus effectively, we can expect a renewed respect for authority as the mechanism through which chaos is avoided, though this will be highly territory-specific and might not be long-lasting. Either way, this is a test of corporate and institutional value and values. Microsoft making Teams free is one positive immediate example.²² Mental health apps such as Headspace and Unmind offering themselves free for health workers and teachers is another.²³

PURPOSE FIRST

COVID-19 will accelerate the trend towards corporate purpose made visible through experiences and corporations standing for something bigger than their core output.

During the pandemic, the role for the private sector on the front line is increasingly clear as government, central banks and the WHO cannot defeat the disease alone.²⁴ The extent to which companies direct their resources—people, process and technology—toward solving problems over selling products will demonstrate to customers and employees what they truly stand for.

Some will make changes they will not be able to reverse from. In the US, AT&T was the first of many internet service providers to remove all data caps from home internet usage—and thereby radically change market norms.²⁵ There will be many long-tail impacts on how brands will need to navigate a newly sensitive society, even when the world is in recovery.

How to respond

Figure out the role you can play in the COVID-19 economy. Engage your employees — but don't practice virtue signaling. Be kind and do the right thing now (practice looking back from the future and evaluating decisions in the rear-view mirror), and measure brand impact by how you can help. Become expert in detecting human signals and what they mean for your organization and how you can pivot to meet them.

NOW

- **Define your crisis purpose:** If not done already, implement a Crisis Purpose Definition across the company. Businesses that take seriously their responsibility to customers, employees and supply chain will thrive (and be judged) afterwards.
- **Adjust your success measures:** Define operational metrics, bearing in mind that this is not the time for winners and losers... we all need to win together.
- **Run an Ambassador/Influencer Program:** Consider the role of brand ambassadors and influencers and who you choose to elevate or recognize—basing it less on who is driving the most product, more on who is helping the most people.

NEXT

- **Plan for greater government confidence:** Enact regulation, especially in technology or anything touching on health.
- **Set up Brand Permission Space Analysis:** Consider how this crisis has given you permission to go beyond your brand core. Identify what you have permission to do post COVID-19.
- **Focus on experience-led purpose:** Social responsibility will become central to all organizations. Double down on identifying purpose and building brands from purpose-led experiences upwards, not top down.
- **Sharpen your EQ to understand behavior:** Hone your emotional intelligence to better understand your customers' and employees' behaviors—new, changed or those left unchanged. Be ready to draw on all three sources of data: big data, thick data (deep insights on people), and broad data (contextual and market trends). Ensure that all data sources are constantly updated and utilized across the organization.

What organizations can and should do next

The most important action any organization — wherever in the world it is, whatever its customer base — can take is to commit to the continuous process of an Experience Audit based on a deep understanding of behavior change.

1. Become a good listener

Hearing the early signals from customers in terms of what they want and how they feel is already important but set to become even more so. And in the same way, an organization's ability to respond to these signals quickly and appropriately will be business-critical.

2. Pivot your experiences

At every point to take account of the new customer reality. This is not a one off: Behavior change will continue as the new plays out. Develop a tight interlock between listening and pivoting as a core business habit.

3. Learn from customers

Individuals, families and social groups are all sources of creative innovation adept at hacking new ways to live. Already, people are responding to COVID-19 by innovating for themselves. Watch that innovation closely and use it as a source of creativity for innovation in your business.

4. Be bold: Reassess your brand and business

Ask yourself if your brand or business is future-fit for the “new normal” into which the world will settle once the crisis has passed.

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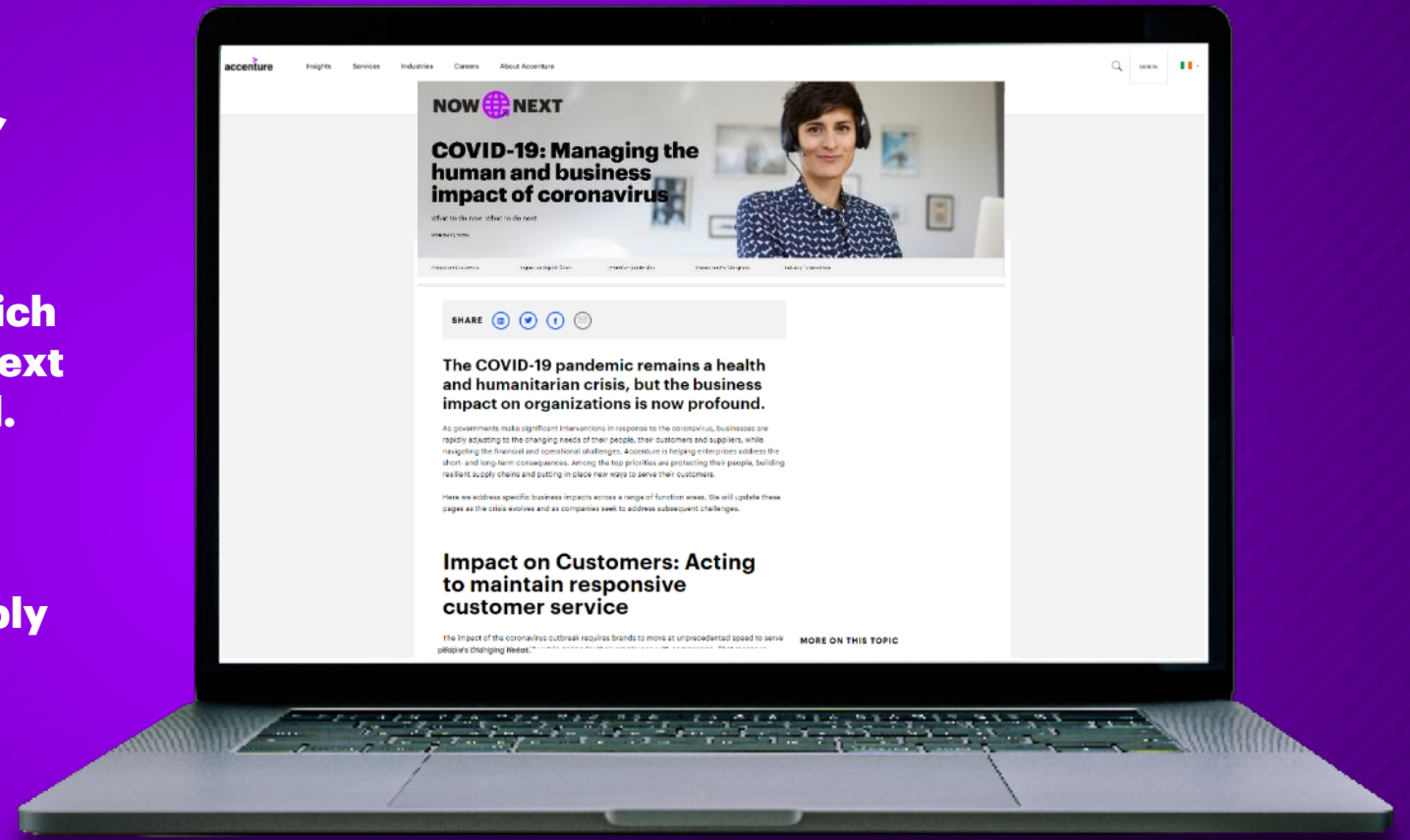
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To help our clients navigate both the human and business impact of COVID-19, we've created a hub of all of our latest thinking on a variety of topics.

Each topic highlights specific actions which can be taken now, and what to consider next as industries move towards a new normal.

From leadership essentials to ensuring productivity for your employees and customer service groups to building supply chain resilience and much more, our hub will be constantly updated. Check back regularly for more insights.

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