Human Signals

Exploring emerging human behaviour and service purpose during COVID-19

Tracking today's challenges to find tomorrow's solutions

Edition 4 | September 2020

EY
Building a better working world

A rolling research project

EY Seren helps organisations achieve growth by serving the needs of people, communities and the planet.

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The EY Seren team is running two-week sprints of mixed-method research to understand how the global pandemic is **changing how we live and how we work.**

The starting hypothesis is that **human behaviour is changing significantly, and that service providers will need to significantly change what they offer and how they offer it, to meet these new needs.** To do that, the EY Seren team is running:

- **Desk research** across over 400 sources
- **In-depth interviews** with people, virtually, in their own homes about what really matters to them right now
- **Diary studies** with customers across the UK to get insight into how behaviour is changing
- **Interviews with design leaders and experts across sectors** to understand how COVID-19 is transforming the role of design and delivery
- **Quantitative surveys** to validate and scale our insight

The EY Seren team is taking an iterative approach to this research, working in **two-week sprints to continually challenge our assumptions** and publish what we discover to our community. If you want to **share your opinion** or find out more about this research, please let us know.

The anatomy of an insight

For each edition, we're collecting our research into a series of insights. We expect these to morph and adapt through this series of papers. All references are at the end of the document.

Welcome to the final edition of this season of Human Signals

The EY Seren team started a week before lockdown and haven't stopped since, running fortnightly sprint cycles, across five streams of research, to publish four editions.

It's been a privilege to research human behaviour during such a profound moment in history, and humbling to be a part of the lives of our research participants as they demonstrate enormous resilience and adaptability in the face of adversity.

The EY Seren team has also been blessed with huge engagement back from you, our readers, with many volunteering your scarce time to share your own stories. All of it has helped us to think in different and unexpected ways.

As the EY Seren Research and Insight team, we believe helping humans to continuously understand each other, and become more responsive to one another's needs, is central to successful transformation — whether personal, organisational or global.

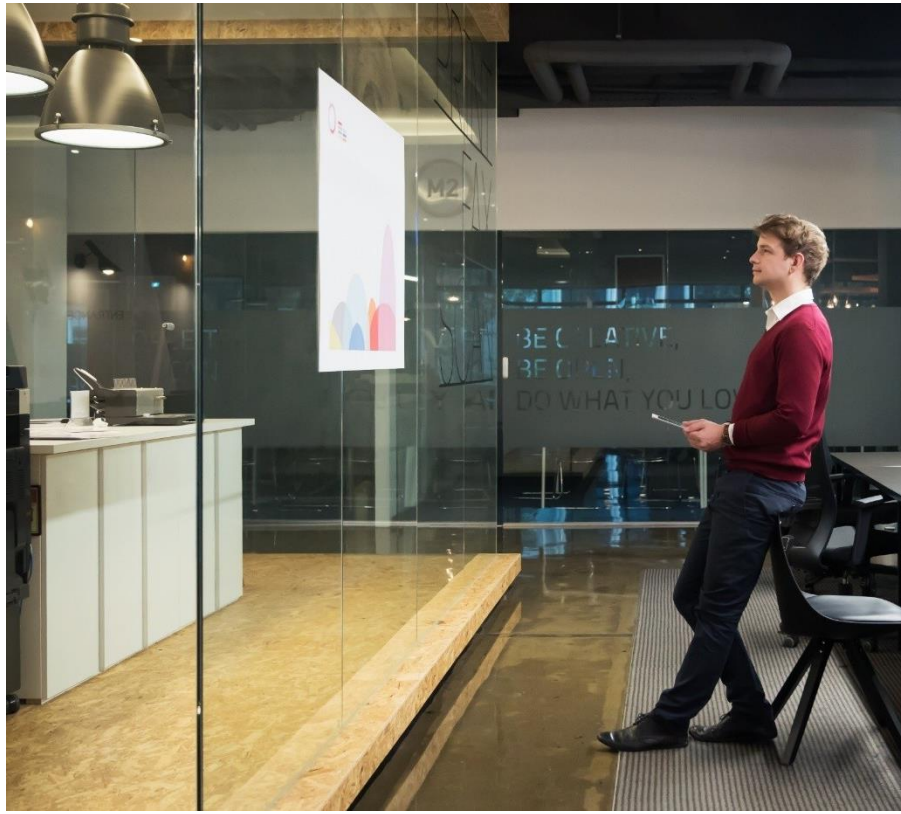
At the core of Human Signals are three principles:

- **Appreciating and embracing human complexity.** We work to understand deep and complex humans, with all of their contradictions, dilemmas and irrationality: a whole self view.
- **Employing that better understanding to trigger a renewed commitment to serve one another** — whether as provider to customer, or leader to employee.
- **Using data and insight to create a transformational growth mindset** — whereby teams can rethink what value and experience mean, and more confidently imagine and design alternatives that work better for people.

We hope these principles come through in this final edition in the season, as much as in the previous three.

Human Signals will be back later.

Edition 4 contents



New insight themes

A perpetual, slow-moving roller coaster – welcome to the new normal

The world is reopening, nothing about it is normal and there isn't a clear end in sight – so people tap deep wells of resourcefulness

Double dip – everyone is coming to terms with the new economic reality. There's a difference between being told it was coming, and reading about daily job cuts and friends being out of work. The threat of the double dip (one health dip, one economic dip).

No clear way out – people are gradually realising this isn't a Hollywood movie – there is no conclusive heroic victory – at least not yet. Instead predictions of a second wave and the ongoing lack of a cure, despite all efforts to find one, are sapping people's optimism.

Waning energy – The purpose-driven energy of phases 1, 2 and 3 is draining away. Fatigue is setting in. This is to be expected – the sprint dynamic of those phases is now becoming a marathon. Add the threatened loss of the precious summer holiday recharge and there's little respite.

Dogged determination – as with any marathon, what's required is stamina. Psychological resilience is the key to success. That means a dogged determination to keep trying new things, often in the face of challenging odds. When the world seems to be saying "no", to take that as a question, rather than as an answer.

A period of ups and downs – in many ways, this is a timely point to publish our last edition of this season of Human Signals. As a group, we think we're in the 'new normal' now, at least for the foreseeable future. A new normal characterised by infection spikes, local lockdowns, economic headwinds, etc. However, we're also positive that deep wells of human resourcefulness are being tapped, both inside and outside of our organisations, to help us look after ourselves and each other.

Phase 1 and 2

Social distancing and isolation

18 weeks

Most countries have been through one or more versions of this now.

Phase 3

Pulsing and false recovery

12–18 months

Many countries are now emerging from phase 3, with social distancing in place alongside ongoing government stimulus. Regional and temporary isolation is pulsed as infection spikes occur.

Phase 4

Pulsing and true recovery

12–18 months

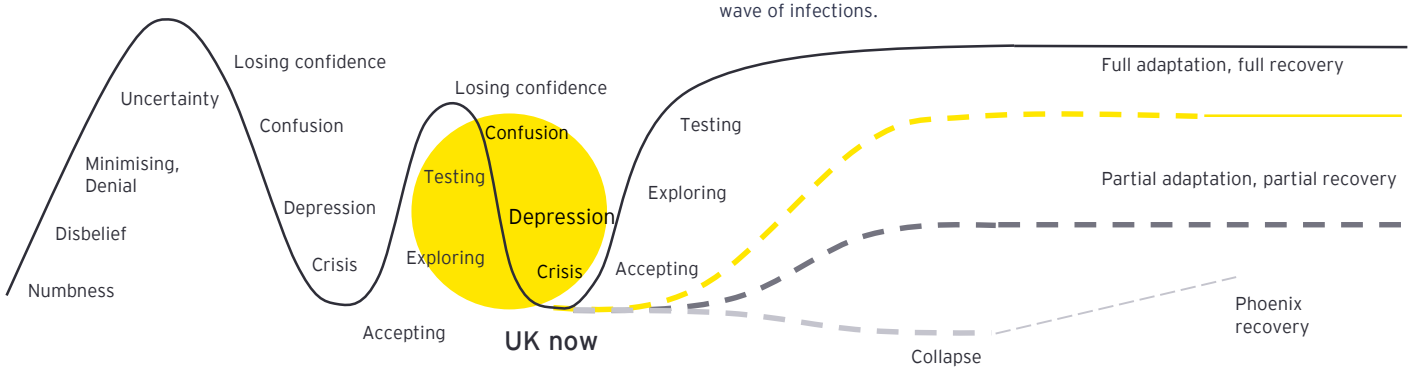
As governments begin to remove or reduce stimulus programmes, the true impact of the crisis is revealed, leading to insolvencies and redundancies. A new economic crisis emerges, forcing people into a second wave of recovery. At the same time we can't rule out a second wave of infections.

Phase 5 and 6

Vaccine/immunity

24 months

40 global teams continue to hunt for a vaccine, whilst ultimate immunity remains inconclusive.



Gradual awareness leads to overnight change in behaviour. People are forced to rapidly shift behaviour to adjust to lockdown.

Service providers focus on short-term service resilience and continuity.

Many people begin to accept aspects of the crisis, exploring and testing new ways of living and working. Others take longer to adapt or adapt less well or not at all. Strong government stimulus helps sustain normality.

Providers step back and start adapting existing journeys and channels, and launching new propositions to help customers begin to recover themselves.

As economic stimulus is removed, a wave of insolvencies and redundancies damage much of the recovery work, with people now needing to pick themselves up again.

Successful providers are better prepared for this new spike of demand, with new propositions in place to help customers and employees through the change.

A range of end states materialise, based on two variables – how well the individual recovered and how long it has taken them. Some will have to invent new futures for themselves, whilst others recover from the ashes through 'moment of truth' interventions.

Successful providers survive recession with their strategy and purpose intact, and are able to innovate at speed, remotely and at low-cost, to create an effective future for their customers and colleagues.

Human Signals – macro trends and trends

For each edition we add new themes to existing ones, compiling a full overview of our insight to date

Macro trend	A culture of fear		Daily resilience and resourcefulness		Hopes for a better life and world	
Trend	**Landscape of fears**	**Dissonance and uncertainty**	**Digital everything**	**Adapting my everyday**	**Finding a new purpose**	**A new world of possibility**
Trend summary	We've been told the world is a more dangerous place, ruled by an elusive invisible foe, yet we're also being encouraged to re-enter that world.	We share an underlying sense of ongoing uncertainty, with descriptions of a new normal that hasn't quite arrived – of a **generation in crisis**.	Digital is no longer about us doing something on a screen, it's now just how the world works.	Our sense of routine is shaken by the new, forced physically-distant world.	Regardless of who you are or where you are in the world, everyone has shared in a common purpose: overcome the virus and help others do the same.	What was once impossible, has been proved possible. The government paying salaries, 1m NHS volunteers in days, a 100-year-old raises £34m for the NHS from his garden.
Past insights	Some are desperate to **escape from home** and regain routine and normality, whilst others are hesitant of the risks. The question on everyone's mind is: **do I trust it?** The politicians to heed the scientists? My employer to keep me safe? The shop to maintain hygiene? We rely on a new architecture of **health evidencing and policing** to navigate things.	There's a lot of **reality shock** and plenty of **daily dissonance.** We're energised by the way the crisis has brought people together yet unnerved by the physical separation we feel every day. We're excited to see how the world has created solutions to the crisis, but anxious that it's still not enough for systemic bias and the climate crisis. We're inspired by new forms of leadership, but also fearful of still-prevalent, darker forms of leadership.	In 12 weeks we have seen how social, mobile, data and web have revolutionised how more and more people work, play and shop. We all **adapted and are becoming more adaptive** to this change. For many people and their service providers, this has **strained their digital capacity**. For a small but significant minority, digital exclusion remains a significant issue.	Closure of shared spaces and the **homification of work** has isolated many. A shift from consumption to production, as people and organisations **make do and mend**. A strong sense that people's the crisis is creating **polarised experiences.** Digital hyper personalises everything it touches – it will be no different for the **million new normal** of work tomorrow.	Neighbours and colleagues have instinctively sought to help one another, finding **a new purpose in service.** Many have warmed to **a new era of leaders**, who calmly embody this sense of purpose, serve all, instill calm and reassure their people. People are **re-evaluating their priorities**.	Although **we've all lost something**, we're also energised by the potential to achieve what was once thought impossible. This includes acting with **less bias and more compassion.** In our organisations and institutions, **enterprise agility has been tested**, and in many cases found in abundance. 90% of GP appointments were face-to-face, now it's 90% remote. **Necessity is driving invention**.
New insights this edition	Individuals and organisations are coming to terms with how to balance productivity and wellbeing as people describe having **more time, but less energy.**		In a world of change, organisations are embracing **cultural ambidexterity**. As policy and guidance changes from above, we find ourselves in an **era of design hacks**.		People are proving it's not about social distancing, but instead about being **physically distant, yet socially intimate.**	

An era of design hacks

- As lockdown continues to ease and we emerge from our homes into an unfamiliar low-touch, socially-distanced way of being, **each of us is having to adapt how we interact with our surroundings.**
- Although the spaces we are re-entering may be familiar, our behaviour within them has to change. **And with this comes confusion and anxiety** – fear of doing the wrong thing, bewilderment around what is right.
- To guide us through this maze, **a myriad of design hacks have popped up to encourage us adopt the correct behaviours**. Hastily pulled together at the height of the crisis, typed signs on shop doors, strategically-placed traffic cones, floor stickers, plastic barriers, webs of hazard tape …
- **It's overwhelming**, and will take time for us to process these changes and adapt our behaviour. But these design interventions have a critical role to play in keeping us safe.
- We are starting to see these evolve beyond the initial hacks into interventions that are clear and unambiguous. More considered **digital hacks are now emerging, to help us make this shift to a low-touch society** – for example, no-touch menus via QR codes in restaurants.
- It's vital for our sense of well-being to spend time in social spaces – but to do this **we must feel safe and trust that others are looking after their (and our) safety too.**

How long will it last

We're fans of a design hack as it's symbolic of creative thinking and adaptation at the frontline. The variety is to be expected in the flurry of response. However now that we're expecting this low-touch and physically distanced society to be in place for as long as the virus is with us, the hacks need an upgrade. And any upgrade needs to be flexible – should early indications of airborne transmission prove true, it'll need re-hacking.

Supporting evidence

- 'These design hacks – attempts to rescript how people use buildings and outdoor areas during a viral pandemic – represent the messy in-between of dealing with a crisis in real time. Most use cheap, humble materials, and aren't exactly pretty to look at. But they reveal real ingenuity under time and budget constraints.' – Bloomberg CityLab
- 'Some businesses want to create a pleasant environment, but this is a crisis. It's not about being nice. This isn't about advertising slogans […] The quality of the information needs to be as unambiguous as possible. It needs to be as consistent as we can get it, so we're teaching one language to everybody..' – Tim Fendley, Applied Wayfinding, quoted in Quartz article

Human insights

- 'I had a bad experience when I was waiting in line at the supermarket. I got reprimanded by other shoppers for standing too close to them – I hadn't noticed the footprints stuck on the floor.' – Diary study participant, Female 56
- '[On returning from a shopping trip] I find myself increasingly annoyed by people who don't follow the one way system, I wonder why I bother when no one else does?' – Diary study participant, Female 32
- 'In our department, our lab technician has been making little door connections for ITU so we can open doors without touching them, arm through and pull it.' – NHS worker

"

In terms of sharing physical spaces, **the most commonly cited factor consumers said they needed were 'social distancing markers' (55%)** with 6% saying that nothing will help them feel confident in sharing spaces and 8% happy to share spaces regardless of what actions are taken.

– Human Signals survey

Implications today

- The priority for any wayfinding is for it to be clear and unambiguous. This is more important than it being polite or branded.
- Design for inclusivity, taking into account the needs of those who experience our environments in different ways, whether that is physically, cognitively or socially.
- Step back and review how well the design interventions are helping your customers and colleagues adopt these new behaviours, ideally in trial conditions. Be ready to refine and iterate.

Implications tomorrow

- The myriad of solutions may have been fitting in response to a crisis situation, but given the potential longevity of the situation, the need for consistency of approach and language is going to become ever more important to build behaviours that become second nature to us all.
- Make your signage and wayfinding adaptive, to accommodate any new learnings about the virus.
- Take the opportunity to re-imagine the way we design our shared and public spaces.

Physically distant, socially intimate

- The COVID-19 pandemic has changed the way we engage socially. Physical distancing and separation has forced an **embrace of new formats and digital technologies** so families, customers and fans can maintain some level of social intimacy.
- Brands with high street locations have switched staff to video conference channels, to reach out **one-to-one** to vulnerable customers in new ways. Small businesses have been using Facebook and TaskRabbit to set up same-day local home deliveries.
- Similarly **one-to-many online events** have proved effective stand-ins, with concerts, exercise classes and church services moving online. Though with one survey finding that "55% have not watched a live online event during this pandemic" there is **evidence of untapped potential**. At the same time, the **perceived ticket value of online events is lower than offline.**
- Elsewhere, physical events have also been forced to diversify, with drive in concerts, films, operas, church services and even raves growing in number.

How long will it last

The cultural shift across all consumer segments and demographics to embrace virtual and diversified means of staying in touch with others during lockdown opens up new opportunities to connect to people. These aren't just temporary, additional channels to add to the mix. We believe leading services will blend these in more permanently.

Supporting evidence

- 'Walmart recently announced that it's opening temporary 'contact-free drive-in movie theaters' in 160 of its parking lots around the country.' – Fast Company
- 'If you have any of the following in combination: indoors, crowded, closed spaces, without any sort of personal protective equipment like masks, which you're not going to have eating – I think those are all high-risk.' – Dr. Abraar Karan, Physician and Public Health Researcher at Harvard Medical School, BBC

More than

7 in 10 people

in the UK are now making video calls at least weekly

People over 65 who make a least one video-call each week increased from 22% in February 2020 to

61%

by May 2020

What's the most you would pay to attend a live online event?

> When tickets went on sale last Friday for @TheDriveIn's first London event, they sold the 1,500 tickets across 14 screenings in less than a minute
>
> – FT

Implications today

- Up-skill front line staff in the appropriate use of new virtual channel, in line with latest regulatory advice.
- Design virtual channels with human interaction clearly in mind, to avoid slipping into the 'uncanny valley' where interactions feel strained and uncomfortable.
- Consider creative ways of blending virtual technologies within physically constrained locations, to create new service experiences.

Implications tomorrow

- As we shift to a more blended use of digital, physical, virtual, and voice channels, measuring customer sentiment, business performance, and cross-channel demand will become critical in creating the future customer journeys that will drive engagement with customers and create new opportunities.
- Not all teams will have the aptitude to engage confidently across this new, permanent channel. Effective performance management, training, and coaching will needed to encourage not just adoption, but adeptness at virtual relationships.

More time, less energy

- As the crisis plays out, a new pattern is emerging. Many (though certainly not all) are experiencing **a confusing new reality of having more time than before, yet simultaneously having less energy.**
- Much has been made of the return to productivity from initial lockdown, but **the real impact of coronavirus is not on productivity, but happiness and creative reasoning.** In one study, although productivity in a work from home group increased by 13%, half the participants wanted to return to the office, mainly for reasons of loneliness.
- If your **home environment is unsuited to work**, the office can provide space to share ideas, socialise and maintain a work-life divide. Equally, home workers can be prone to **spending more** time indoors, leading to less daylight and consequent effects on melatonin and alertness. Add to all this the loss of routine, sense of uncertainty and back ground anxiety, and you have a **recipe for burn out.**
- With the threat of a second wave lockdown, amidst ongoing disruption of precious summer holiday escape plans, we expect energy to dip further as time at home expands. If left unchecked and unmanaged, some are predicting a **second wave of absenteeism in late 2020**, which will destroy any early 2020 productivity gain

Supporting evidence

- 'This will result in a secondary epidemic of burnouts and stress-related absenteeism in the latter half of 2020' – World Economic Forum
- 'Companies will have to learn that remote work is different work. Managers will have to get better at judging productivity by setting and monitoring specific goals rather than using the proxy of office attendance. Workers will have to adopt extraordinary conscientiousness when it comes to dividing their day into deep work, office communications, personal time, and civic or family life' – The Atlantic

70%

Of those who want to return to offices cite social and mental health issues

2.6b

people globally in some sort of lockdown

28%

of quarantined parents warrant a diagnosis of "trauma-related mental health disorder"

Implications today

- Consider your 'return to the office' strategy through a dual lens of productivity and mental health, rather than overly focusing on the former
- Model what proportion of colleagues are at risk of burnout over the second half of 2020 and put in place support mechanisms for them
- Ensure all communications balance a focus between productivity and wellbeing, and the long-term value creation that will sustain

Implications tomorrow

- Consider moving from large single HQs to more flexible hubs, where colleagues can gather an work together as-and-when required.
- Develop Phoenix Recovery Models for colleagues who have burnt out and need help recovering 'from the ashes'. Remove stigma from taking these programmes on

How long will it last

It's important to note that this isn't really a home working experiment. It's an experiment in isolated working, and as such be cautious making quick long-term decisions. We think remote working has proved itself to be productive, however we expect that, for a significant proportion of people, it's just not that enjoyable.

"Understand that this is a marathon. If you sprint at the beginning, you will vomit on your shoes by the end of the month.

– Aisha S. Ahmad is an associate professor of political science at the University of Toronto

Cultural ambidexterity

- The role of culture in handling the outbreak has been put centre stage. At the outset, **many anticipated a wholly rational and data-driven approach to decisions. However, culture has played a more significant role,** with countries, organisations and households all responding in markedly different ways, based on internal culture.
- One way to assess this situation is through the work of cultural psychologist Michele Gelfand. Author of *Rule Makers, Rule Breakers*. According to her team's study of culture, **countries sit on a spectrum from tight to loose.** Tight countries enforce a wide range of rules and citizens are used to obeying them. Loose countries have laxer rules and are more tolerant of dissent.
- At organisational levels, many have described a **rapid 'loosening up' of decision making** and pushing back of tight constraints, championing the **move to agility, adaptability and looseness.** However the research indicates that loose cultures have performed poorly during the coronavirus outbreak, with higher infection and death rates.
- The key learning from the research appears to be that **a combination of both tightness and looseness is required** – a cultural ambidexterity – tight controls and measures, combined with loose controls for individuals and teams so they can respond quickly.

Supporting evidence

- 'Countries with the most draconian laws and harshest punishments are those that have historically faced a barrage of existential threats. These persistent foes include famine, natural disasters, invasions from rival tribes—and you guessed it—outbreaks of infectious disease. Because these threats are present to varying degrees, our cultural practices and social norms have evolved accordingly. Tight cultures instil order and stability, at the cost of being less tolerant and creative. On the other hand, loose cultures are open and dynamic, with the drawback of being more chaotic and disorderly.' – Ethical Systems
- 'Tight rules regarding social distancing are critical, yet looseness within these constraints may also help to spawn the development of creative technical solutions that are needed to contain the pandemic, as well as creating novel tools to help people feel connected.' – Nature

A cultural study of

33

Countries revealed a distinct split in culture

Implications today

- Don't throw out the baby with the bathwater. Control frameworks and governance have an evolved value, and need to be optimally balanced with newly discovered agility and pace.
- Rather than simply following local, national COVID-19 guidance, or following competitors, instead interpret your response in terms of your local culture, and what that decision reinforces or shifts.

Implications tomorrow

- Ask yourself whether you're inherently tight or loose as a culture and whether that is an inherited reality that's appropriate for today, or something to be consciously moved away from.
- Explore whether a two-speed operating model is right for you – with a tight established business, and a looser 'challenger business' able to perform in a more agile way.

How long will it last

Agility has become a business obsession for some time now. A desire to strip away tightness in favour of looseness. But the COVID-19 pandemic reminds us that we need both, as tightness evolved in societies for good reasons of collective survival. This reflects our experience. That teams perform best when trusted to work flexibly within a tight context.

"You have to be tight on setting expectations and clear what you want your staff to do. Then loose to give staff the freedom and empowerment to figure out the best way to meet their targets. And then tight again on follow-up, so staff are accountable.

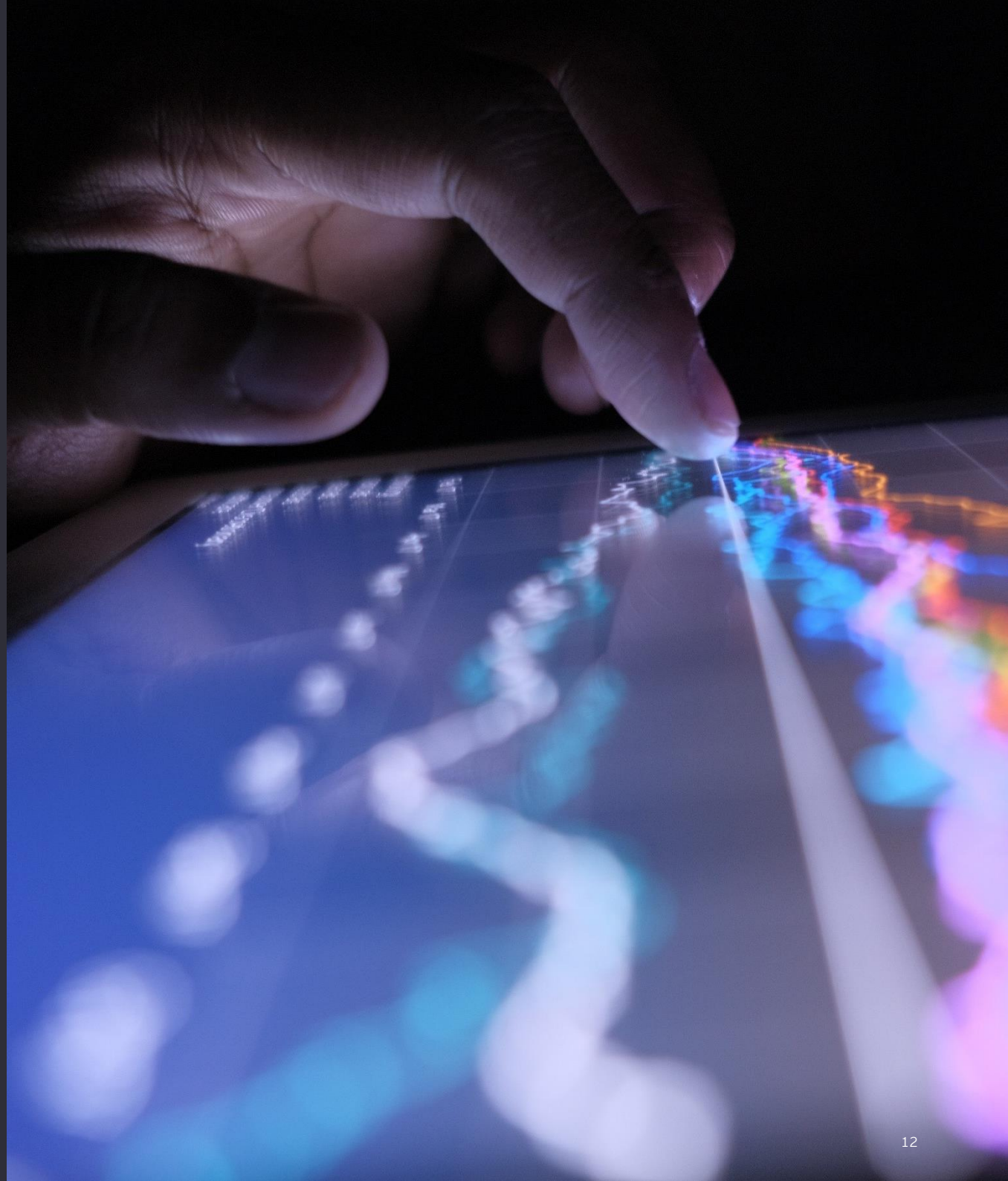
– Sigve Brekke, CEO, Telenor

Quantifying what we've learnt from this season of Human Signals

We ran a quantitative survey to bring statistical validity to our research.

In this section, we'll explore how we did it and deep dive into four themes:

1. We've all lost something
2. Homification of work
3. Digital everything
4. Do I trust it?



Our quantitative survey methodology

Research objectives

For this element of the research, we wanted to prove or disprove our qualitative and secondary research findings. In particular we wanted to understand the following:

The individual

- Capacity/resources to cope with the COVID-19 pandemic
- The most trusted source of guidance
- Comfort in sharing spaces
- Contact tracing adoption

The colleague

- Benefits/challenges of working remotely
- Employer support
- Desire to continue working remotely

The customer

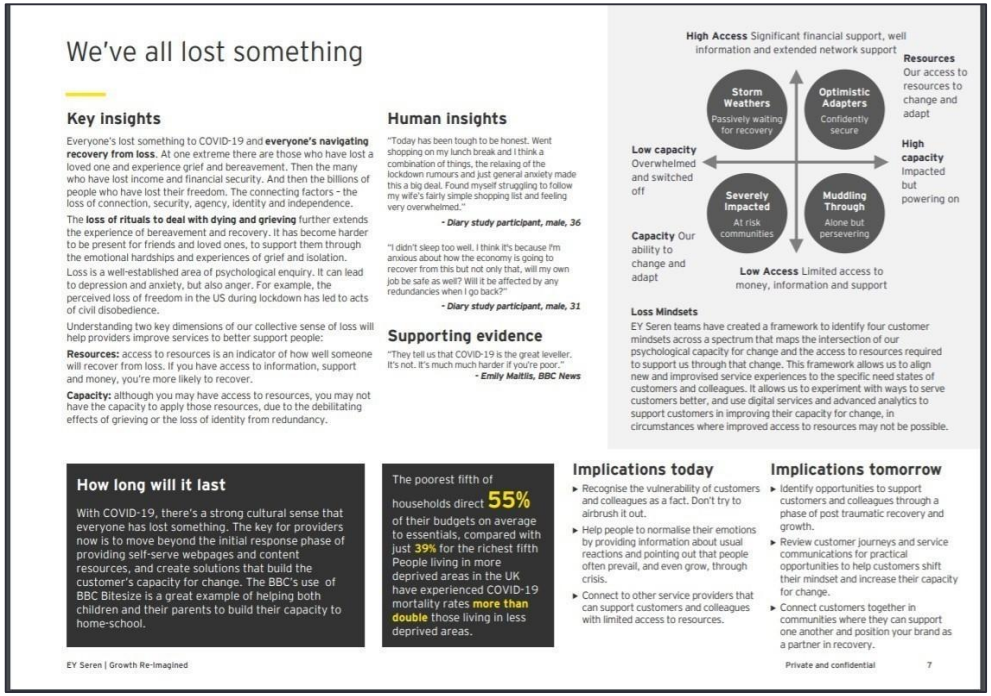
- Digital use of services
- Likelihood to continue using digital
- Triggers and barriers to digital adoption
- Importance of service attributes

We surveyed 967 people

Target groups	Definitions	% of base
Full-time employed (Remote working)	Participants who have been working predominantly from home since the COVID-19 lockdown	43%
Full-time employed (Non-remote working)	Participants who have been working predominantly from their workplace since the COVID-19 lockdown	21%
Furloughed	Participants who have been put on furloughed since the COVID-19 lockdown	11%
Unemployed	Participants who are currently unemployed (incl. retirees, stay-at-home parent, disabled and unable to work, unemployed but looking for a job, unemployed and not looking for a job)	25%

1. We've all lost something

In edition 2, we came up with the four mindsets of people going through the crisis, depending on their levels of capacity and access. In our quantitative study we decided to understand how UK population is spread across these types, answering the exam question:



We've all lost something

Key insights

Everyone's lost something to COVID-19 and **everyone's navigating recovery from loss**. At one extreme there are those who have lost a loved one and experience grief and bereavement. Then the many who have lost income and financial security. And then the billions of people who have lost their freedom. The connecting factors – the loss of connection, security, agency, identity and independence.

The **loss of rituals to deal with dying and grieving** further extends the experience of bereavement and recovery. It has become harder to be present for friends and loved ones, to support them through the emotional hardships and experiences of grief and isolation.

Loss is a well-established area of psychological enquiry. It can lead to depression and anxiety, but also anger. For example, the perceived loss of freedom in the US during lockdown has led to acts of civil disobedience.

Understanding two key dimensions of our collective sense of loss will help providers improve services to better support people:

Resources: access to resources is an indicator of how well someone will recover from loss. If you have access to information, support and money, you're more likely to recover.

Capacity: although you may have access to resources, you may not have the capacity to apply those resources, due to the debilitating effects of grieving or the loss of identity from redundancy.

Human insights

"Today has been tough to be honest. Went shopping on my lunch break and I think a combination of things, the relaxing of the lockdown rumours and just general anxiety made this a big deal. Found myself struggling to follow my wife's fairly simple shopping list and feeling very overwhelmed."

- Diary study participant, male, 36

"I didn't sleep too well, I think it's because I'm anxious about how the economy is going to recover from this but not only that, will my own job be safe as well? Will it be affected by any redundancies when I go back?"

- Diary study participant, male, 31

Supporting evidence

"They tell us that COVID-19 is the great leveller. It's not. It's much much harder if you're poor."

- Emily Maitlis, BBC News

High Access Significant financial support, well information and extended network support

Resources Our access to resources to change and adapt

Storm Weathers Passively waiting for recovery

Optimistic Adapters Confidently secure

Low capacity Overwhelmed and switched off

High capacity Impacted but powering on

Severely Impacted At risk communities

Muddling Through Alone but persevering

Capacity Our ability to change and adapt

Low Access Limited access to money, information and support

Loss Mindsets

EY Seren teams have created a framework to identify four customer mindsets across a spectrum that maps the intersection of our psychological capacity for change and the access to resources required to support us through that change. This framework allows us to align new and improvised service experiences to the specific need states of customers and colleagues. It allows us to experiment with ways to serve customers better, and use digital services and advanced analytics to support customers in improving their capacity for change, in circumstances where improved access to resources may not be possible.

How long will it last

With COVID-19, there's a strong cultural sense that everyone has lost something. The key for providers now is to move beyond the initial response phase of providing self-serve webpages and content resources, and create solutions that build the customer's capacity for change. The BBC's use of BBC Bitesize is a great example of helping both children and their parents to build their capacity to home-school.

The poorest fifth of households direct **55%** of their budgets on average to essentials, compared with just **39%** for the richest fifth People living in more deprived areas in the UK have experienced COVID-19 mortality rates **more than double** those living in less deprived areas.

Implications today

- Recognise the vulnerability of customers and colleagues as a fact. Don't try to airbrush it out.
- Help people to normalise their emotions by providing information about usual reactions and pointing out that people often prevail, and even grow, through crisis.
- Connect to other service providers that can support customers and colleagues with limited access to resources.

Implications tomorrow

- Identify opportunities to support customers and colleagues through a phase of post traumatic recovery and growth.
- Review customer journeys and service communications for practical opportunities to help customers shift their mindset and increase their capacity for change.
- Connect customers together in communities where they can support one another and position your brand as a partner in recovery.

EY Seren | Growth Re-Imagined

Private and confidential 7

Who's currently taking the COVID-19 pandemic in their stride and who's struggling now more than ever?

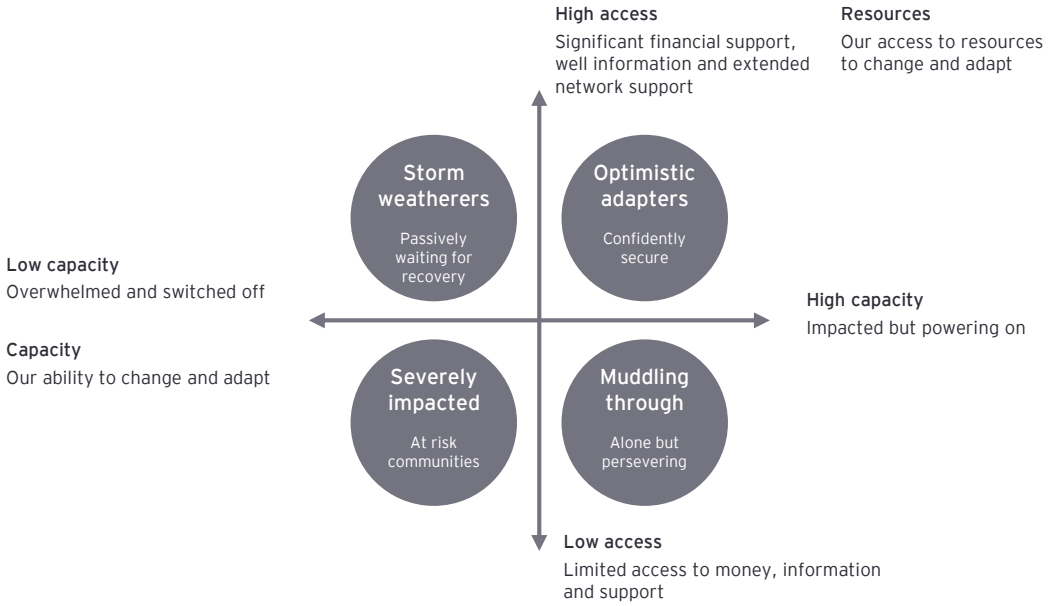
The **most severely** impacted subgroups are:

- **Low income individuals** (<£15k household income)
- **Full-time parents**
- **Those on furlough**
- **Gen Z** (those aged 18-24)
- **The unemployed** (those looking for a job, unable to work due to disability/ill health and those who are currently not looking for a job)

We've all lost something

- In the second edition of 'Human Signals', we developed a framework to understand where individuals sit within the **four customer mindsets** and how they negotiate their own personal recovery from loss and adapt to the new normality. These mindsets are defined as:
  1. **Storm weatherers:** Passively waiting for recovery
  2. **Optimistic adapters:** Confidently secure
  3. **Muddling through:** Alone but persevering
  4. **Severely impacted:** Overwhelmed and switched off
- The mindsets matrix (quadrant to the right) shows where individuals map across the intersection of **psychological capacity** and **the access to resources** needed to support them during this time of change.
- Through our quantitative research, we wanted to find out where the mindset of the UK population is currently at. Who is currently taking the COVID-19 pandemic in their stride and, conversely, who is struggling now more than ever.
- For this analysis we decided to look at people across different **'ages', 'household compositions', 'employment status' and 'household income'**.

Mindsets matrix



Our definitions

What statements define 'capacity' and 'resources'

Capacity	Resources
1. I am optimistic (for the future)	1. I have enough access to financial resources to see me through
2. I am in control (of the future)	2. I have enough access to social connections to see me through
3. I have adapted well to life	3. I have enough access to digital and information to see me through
4. I have experienced more emotional highs than lows	

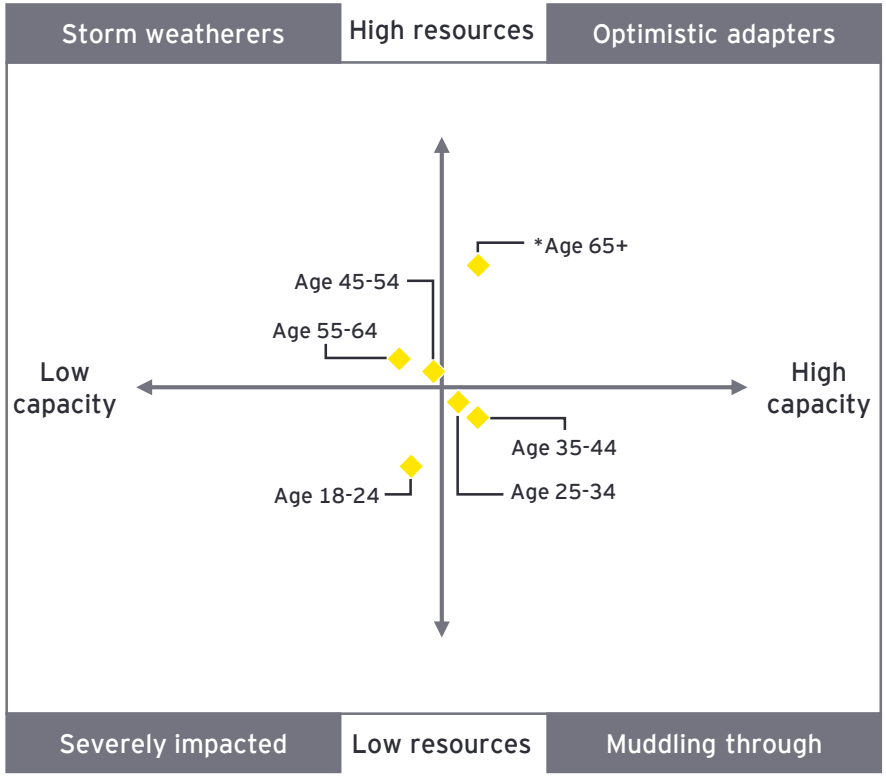
Calculating the mindsets matrix

How to make sense of it

Capacity	Resources
Respondents are asked to tell us how much they agree with the 'capacity' statements to the left. The more participants select either agree or strongly agree to these statements, the higher their capacity to cope. The more participants disagree with these statements, the lower their capacity to cope. Participants are then given a score based on their responses which is used to calculate their overall capacity.	Respondents were asked to tell us how much they agree with the 'resources' statements to the left. The more participants select top two box on these statements (agree, strongly agree), the higher their access to resources. The more participants disagree with these statements, the lower their access to resources. Participants are then given a score based on their responses which is used to calculate their overall access to resources.

Loss by age

- **Gen Z (those aged 18-24)** have been the **hardest hit by lockdown restrictions**. This generation is arguably at the peak of their social powers and the COVID-19 pandemic has encroached on their freedoms. Wider research has shown that they are **twice as likely as baby boomers** to **experience loneliness** and, despite being digital natives, no amount of technology **can replace what they've lost in terms sociability.**
- UCL's research in to wellbeing and mental health has shown that **the older generations have exhibited the highest levels of life satisfaction of any age group**. One theory is that they have **fewer day-to-day stressors**; they are less likely to be working, have less commitments (e.g., home schooling) and are more likely to be used to spending prolonged periods of time at home.



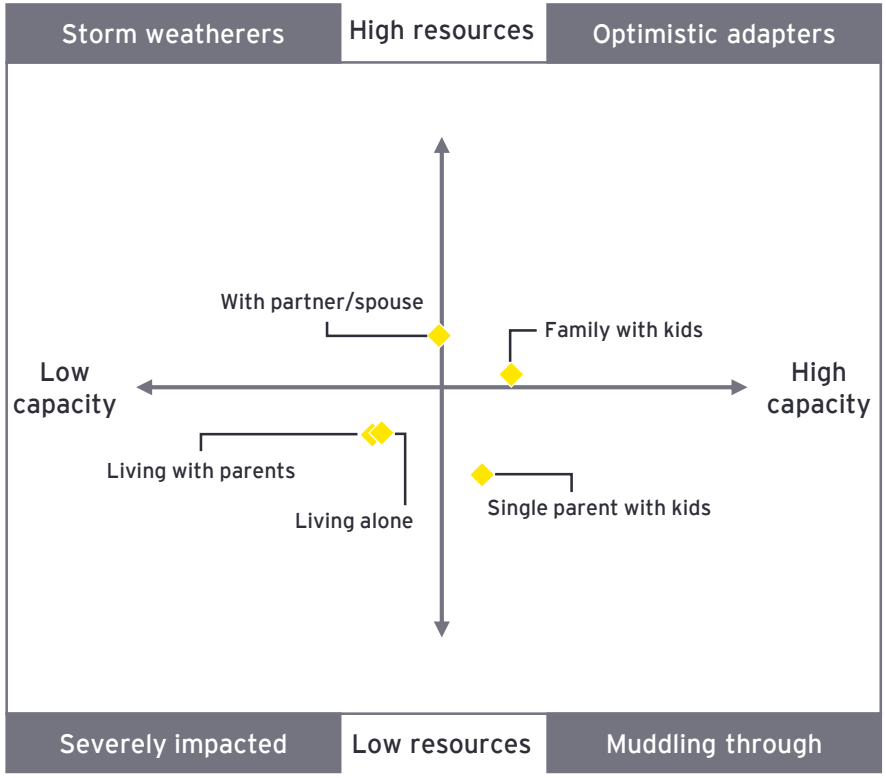
Key insights

- **Participants aged 18-24 are** the most 'severely impacted' of any; overall, they consider themselves to have **lower access to resources** (driven by their perceived lack of social and digital/informational resources) and relatively **lower psychological capacity** (driven by their low self perception of adapting well to life under the COVID-19 pandemic).
- **Participants age 65+ are coping the best**; this age group are the only one to fall into the 'optimistic adapters' category. They consider themselves to have the **greatest access to resources** (driven by their perceived abundance of financial, social and digital/informational resources). They also have relatively strong psychological capacity (which is driven by their strong perceptions of feeling in control of their future).
- **All other age groups are teetering on the edge;** other age-groups are living precariously and any changes in their circumstances could see them adopt a different mindset (fall into another quadrant).

Capacity/resources scorecard		18-24	25-34	35-44	45-54	55-64	65+
Capacity	Adapted well	-12	-8	-2	6	5	2
	Optimism for the future	0	7	4	-3	-7	-6
	More emotional highs than lows	3	11	-1	-1	-9	-3
	Control of the future	2	1	2	-4	0	15
Resources	Access to key social relationships to see me through	-10	-4	-2	1	6	12
	Access to financial savings/ support to see me through	2	-1	-2	-2	1	22
	Access to digital tools/ information to see me through	-18	-5	-1	6	1	6

Loss by household

- **The effect of the COVID-19 pandemic on the household dynamics will be different for everyone;** for some, things will have broadly stayed the same, but others will have uprooted and moved house for various reasons. **'Pandemic nesters'** for example (those who moved back in to support parents or relatives or to be supported themselves), will need to readjust to living under their parent's roof once more and all the permutations that come with it.
- Even in cases where living arrangements have remained unchanged, the restrictions of lockdown and the **knock-on effect of the day-to-day will have amplified.** Those living alone have experienced a different kind of 'self-isolation' than those who haven't; **no amount** of digital access or financial security can **negate the need for human contact. Single parent households** are also **grappling** with a **new normal**; having to juggle the childcare responsibilities with work and, in many cases, without a support network to help.



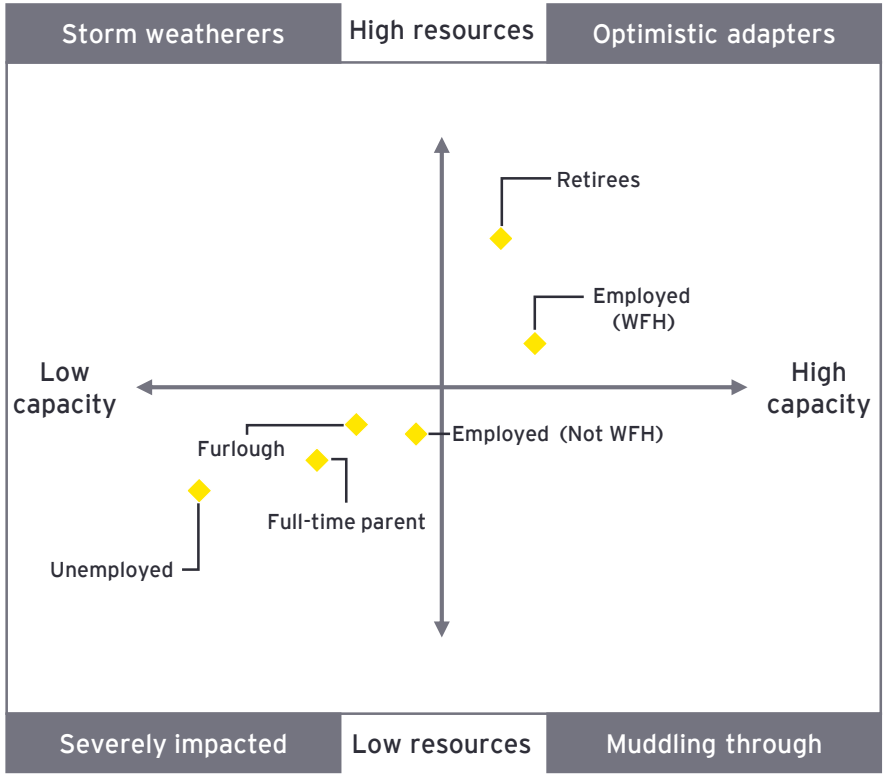
Key insights

- **Those living with parents** or **those living alone** have been most 'severely impacted by the COVID-19 pandemic of any household. Amongst those living with their parents this is driven by their perceived lack of adaptation to life under the COVID-19 pandemic and their lack of access to digital tools to see them themselves through. Those living alone have less optimism for the future and do not have access to key social relationships to see them through this period.
- Households consisting of **a single parent and their kids** are '**muddling through**' but have the lowest amount of resources; this is driven by their perceived lack of access to key social relationships to see them through but also their lack of financial resources.
- Whilst those living with **living their partner/spouse** have the greatest access to resources of any household, their psychological capacity is somewhat modest and most have experienced more lows than highs during this period.

Capacity/resources scorecard		Family with kids	Living with partner/ spouse	Single parent with kids	Living alone	Living with parents
Capacity	Adapted well	2	4	1	-2	-10
	Optimism for the future	8	-1	1	-7	-4
	More emotional highs than lows	5	-4	6	-5	-1
	Control of the future	1	0	3	-2	-1
Resources	Access to key social relationships to see me through	4	5	-15	-7	-6
	Access to financial savings/ support to see me through	-3	6	-9	-4	0
	Access to digital tools/ information to see me through	2	6	-7	-6	-10

Loss by employment status

- Unsurprisingly, those **who are unemployed** or **on furlough** are **amongst the most affected**. Benefit claims made by the unemployed and underemployed in the UK has risen exponentially as a result of the COVID-19 pandemic. **Now over 1.8m people are reported to have claimed Universal Credit.** However, the consequences of the COVID-19 pandemic extend beyond just the risk to human life and financial uncertainty; the **invisible emotional strain is also a very real threat.**
- **Full-time parents** are also likely to be feeling the burden of managing the normal day-to-days of parenthood with the added responsibility of being a 'teacher' too; **there is little escapism or time to reset.** Those still **working** in the normal work environment (specifically key workers) cannot work from home. Throughout the pandemic, they have had to stay at work **despite** the **increased health risks**, the **lowly pay** (four out of ten key workers earn less than £10 an hour) and **family commitments.**



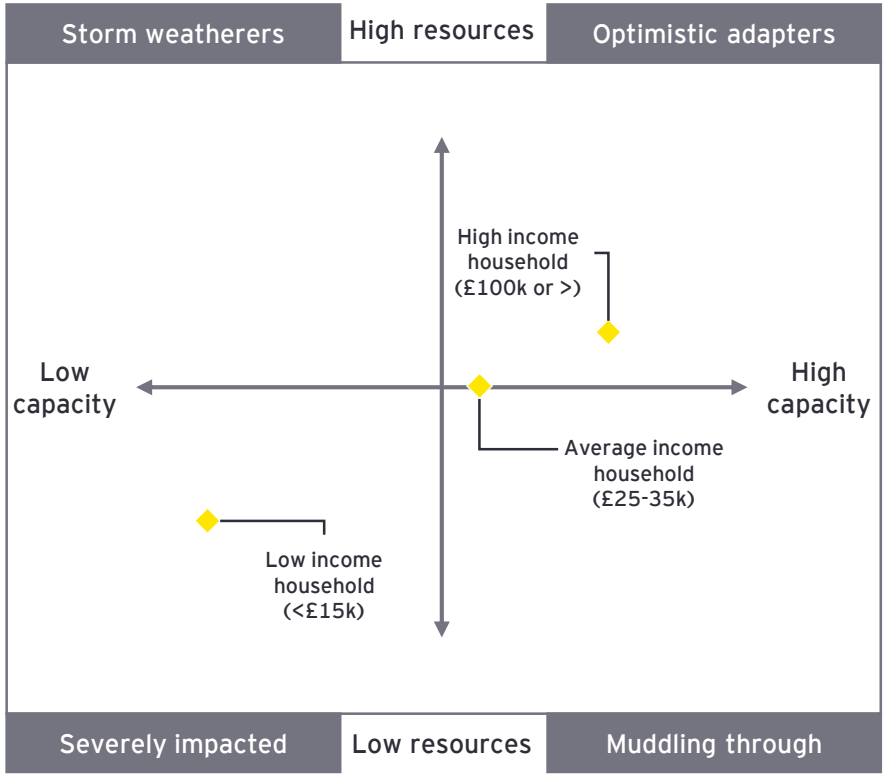
Key insights

- **The unemployed, full-time parents**, those on **furlough** and the **full-time employed (not working from home)** have been the **most severely affected by the COVID-19 pandemic**: in the case of the **unemployed**, they consider themselves to be 'capacity' and 'resource' poor across the board. Those on **furlough** have little optimism or feelings of control for the future. They are also less likely to have access to financial savings to get them through. **Full-time parents** also fall into this quadrant mindset on account of their perceived lack of control over the future and their lack of access to key social relationships and financial savings/support. Those in **full-time work and not working remotely** have moderately **low capacity** and access to resources.
- **Retirees** and the **full-time employed (working from home (WFH))** are coping the best with lockdown; they are the optimistic adapters. **Retirees** consider themselves to have the **greatest access to resources** (driven by their perceived abundance of financial, social and digital/informational resources to see them through). They also have relatively strong psychological capacity on account of feeling in control of their future). Those **working full-time remotely** have the highest psychological capacity of any group (driven by their optimism for the future and experiencing more emotional highs than lows).

Capacity/resources scorecard		Full-time parent	Full-time employed (WFH)	Full-time employed (not WFH)	On Furlough	Retirees	Unemployed
Capacity	Adapted well	-1	1	1	1	5	-12
	Optimism for the future	1	8	3	-11	2	-19
	More emotional highs than lows	-9	7	-2	-3	-3	-15
	Control of the future	-21	7	-2	-9	11	-13
Resources	Access to key social relationships to see me through	-10	5	-8	-4	18	-11
	Access to financial savings/support to see me through	-19	6	-5	-10	23	-15
	Access to digital tools/information to see me through	3	2	-4	0	8	-9

Loss by income

- It will come as little shock to anyone that **low-income households are not coping well** with the COVID-19 pandemic than high-income households. Research conducted by the Institute for Fiscal Studies (IFS) shows that **lower income families were already under financial strain** in the years **prior to the COVID-19 pandemic**. Pre-pandemic, IFS found that **30%** of these households could not cope **with a decrease to their main source of income** as they spend a high fraction of their budget on necessities that are hard to scale back. This **financial strain is likely to manifest itself in other ways** such as increased anxiety, depression, loneliness and pessimism towards the future.
- **Richer households**, on the other hand, have been able to decrease their **discretionary spending**. The Resolution Foundation found that 57% of adults in the top fifth of working age earners have experienced falling outgoings, compared to 30% in the bottom quintile. As a result, **high-income households** are **emerging richer** and with **less debt.**



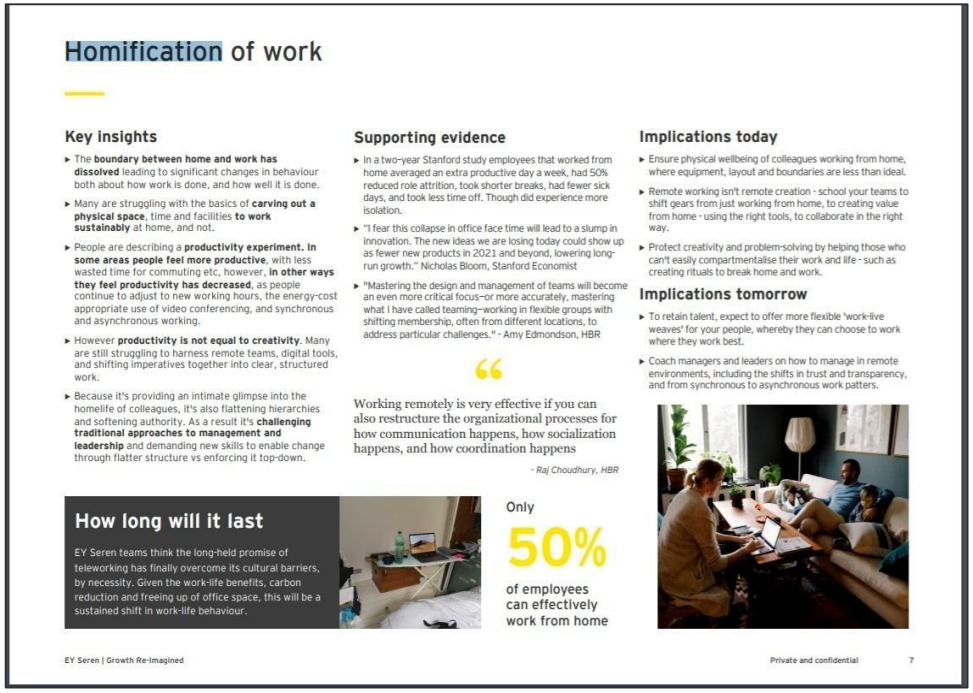
Key insights

- **Low-income households** (earning less than £15k per annum) are the most 'severely impacted' when compared to average and high-income households. Across the board, they have the lowest psychological capacity and lowest access to resources.
- **Average-income households** (earning between £25k and £35k per annum) have above average psychological capacity (driven by having experienced more emotional highs than lows, a greater sense of optimism for the future and their self perception they have adapted well to life under the COVID-19 pandemic). However, their access to resources is close to average.
- **High-income households** (those earning £100k or more per annum) fall within the 'Optimistic adapters' quadrant. Unlike both low and average-income households, they consider themselves to have higher access to resources and greater psychological capacity. The former is driven by their perceived high access to 'key social relationships' and, for the latter, they have a greater sense of optimism and control for the future.

Capacity/resources scorecard		Low income household (<£15k)	Average income household (£25-35k)	High income household (£100k or >)
Capacity	Adapted well	-18	3	5
	Optimism for the future	-16	4	13
	More emotional highs than lows	-13	5	9
	Control of the future	-13	-4	16
Resources	Access to key social relationships to see me through	-16	0	11
	Access to financial savings/ support to see me through	-14	0	6
	Access to digital tools/ information to see me through	-17	1	2

2. Homification of work

In edition 1 we started exploring the implications of remote work, having introduced the 'Homification of work' theme. We used our quantitative study to dig deeper into nation-wide work life experience, aiming to understand:



Homification of work

Key insights

- The **boundary between home and work has dissolved** leading to significant changes in behaviour both about how work is done, and how well it is done.
- Many are struggling with the basics of **carving out a physical space**, time and facilities **to work sustainably** at home, and not.
- People are describing a **productivity experiment. In some areas people feel more productive**, with less wasted time for commuting etc, however, **in other ways they feel productivity has decreased**, as people continue to adjust to new working hours, the energy-cost appropriate use of video conferencing, and synchronous and asynchronous working.
- However **productivity is not equal to creativity**. Many are still struggling to harness remote teams, digital tools, and shifting imperatives together into clear, structured work.
- Because it's providing an intimate glimpse into the homelife of colleagues, it's also flattening hierarchies and softening authority. As a result it's **challenging traditional approaches to management and leadership** and demanding new skills to enable change through flatter structure vs enforcing it top-down.

Supporting evidence

- In a two-year Stanford study employees that worked from home averaged an extra productive day a week, had 50% reduced role attrition, took shorter breaks, had fewer sick days, and took less time off. Though did experience more isolation.
- "I fear this collapse in office face time will lead to a slump in innovation. The new ideas we are losing today could show up as fewer new products in 2021 and beyond, lowering long-run growth." Nicholas Bloom, Stanford Economist
- "Mastering the design and management of teams will become an even more critical focus—or more accurately, mastering what I have called teaming—working in flexible groups with shifting membership, often from different locations, to address particular challenges." - Amy Edmondson, HBR

"Working remotely is very effective if you can also restructure the organizational processes for how communication happens, how socialization happens, and how coordination happens

- Raj Choudhury, HBR

Implications today

- Ensure physical wellbeing of colleagues working from home, where equipment, layout and boundaries are less than ideal.
- Remote working isn't remote creation - school your teams to shift gears from just working from home, to creating value from home - using the right tools, to collaborate in the right way.
- Protect creativity and problem-solving by helping those who can't easily compartmentalise their work and life - such as creating rituals to break home and work.

Implications tomorrow

- To retain talent, expect to offer more flexible 'work-live weaves' for your people, whereby they can choose to work where they work best.
- Coach managers and leaders on how to manage in remote environments, including the shifts in trust and transparency, and from synchronous to asynchronous work patters.

How long will it last

EY Seren teams think the long-held promise of teleworking has finally overcome its cultural barriers, by necessity. Given the work-life benefits, carbon reduction and freeing up of office space, this will be a sustained shift in work-life behaviour.

Only **50%** of employees can effectively work from home

EY Seren | Growth Re-Imagined

Private and confidential 7

What challenges and benefits have employees experienced so far and where do employees want to be working?

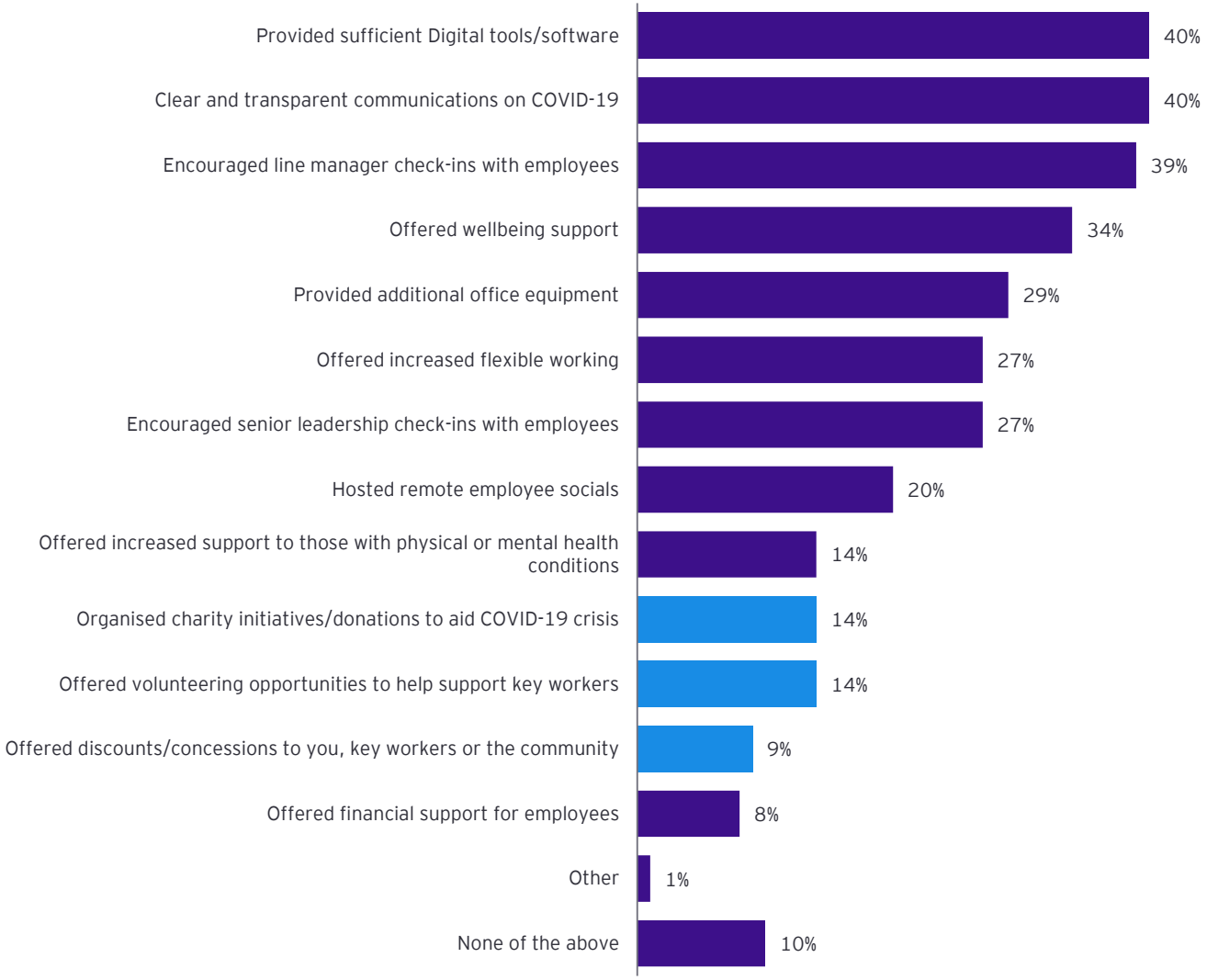
Employees are saying they want increased flexibility on where they work; **76% say** they want to spend **at least half the week or more working from home** post-pandemic.

Whilst many employees have had to overcome obstacles with working from home (whether personal, resource related or due to lack of physical space), **15%** have experienced **no challenges at all.**

Company/employer support during the COVID-19 pandemic

- Employees working remotely have received the most employer support in the form of **'digital tools/software' (40%), 'transparent COVID-19 communications' (40%) and 'line manager check-ins with employees' (39%).**
- However, fewer cite support for the wider 'community'; **'charity initiatives to aid COVID-19' (14%), 'volunteering opportunities' (14%) and 'discounts/concessions for key workers or community' (9%)** are amongst the lowest forms of support that employees have witnessed so far.
- **Interestingly, 10% of employees working remotely said they have experienced 'no additional support' at all.**

Q13. What has your company/employer done to support you, your colleagues and the community during the COVID-19 crisis? Please select all that apply **(Base n=413).**



Graph Key

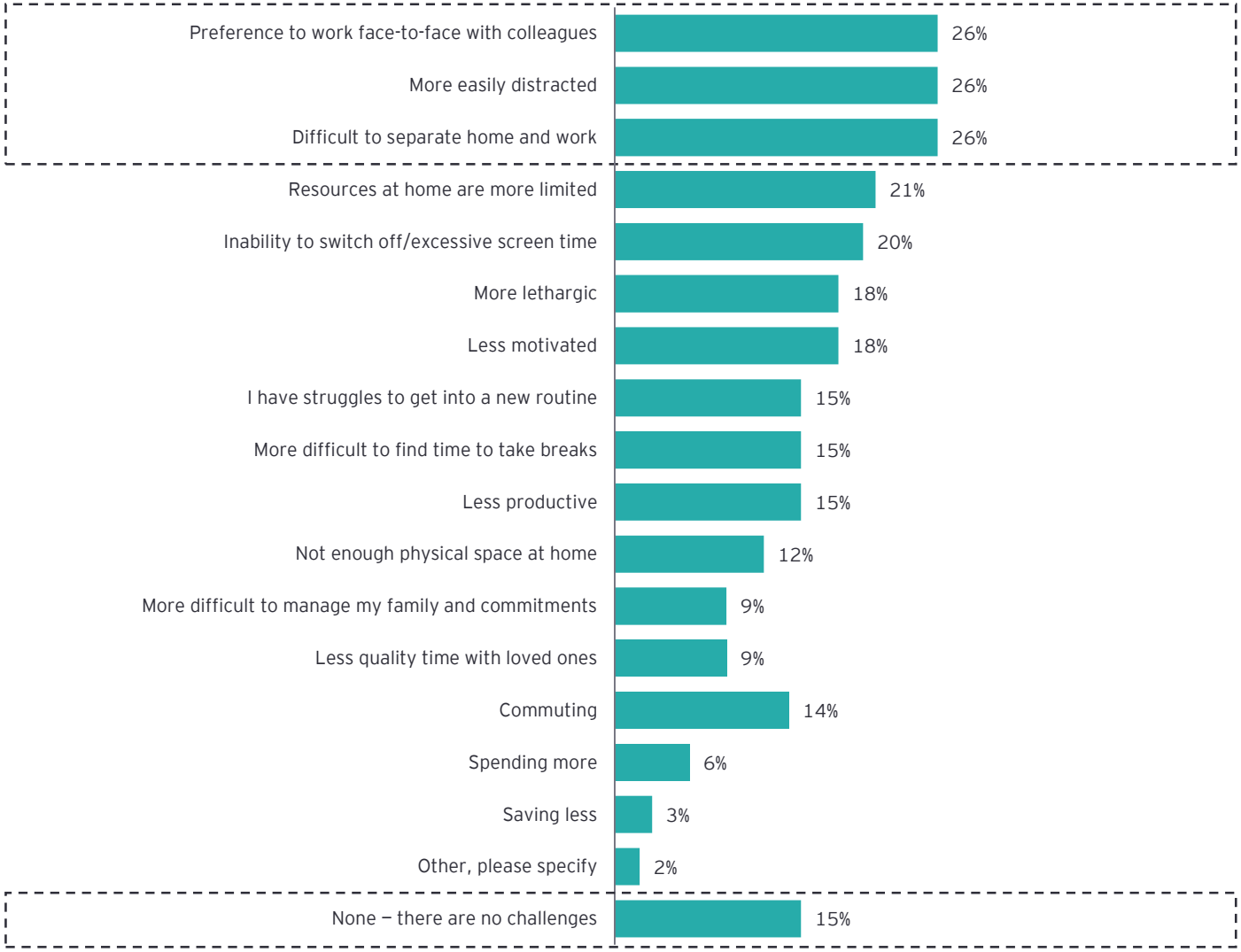
Employee/colleague support

Community support

Remote working challenges for employees

- Findings found that the greatest challenges with working remotely are around the lack of **'face-to-face working with colleagues' (26%);** despite numerous tools to aid virtual working, it is difficult to find an apt substitute for physical interactions with co-workers. For some they are also more **'easily distracted' (26%)** at home; whether this be other responsibilities, life admin or temptations.
- The other biggest challenge is around **'separating home and work' (26%);** arguably the lines are becoming increasingly blurred (particularly for those who may have struggled to compartmentalise the two before the COVID-19 pandemic.

Q11. What, if any, have been the main challenges with working from home for you during COVID-19 pandemic? Please select all that apply. **(Base n=413).**



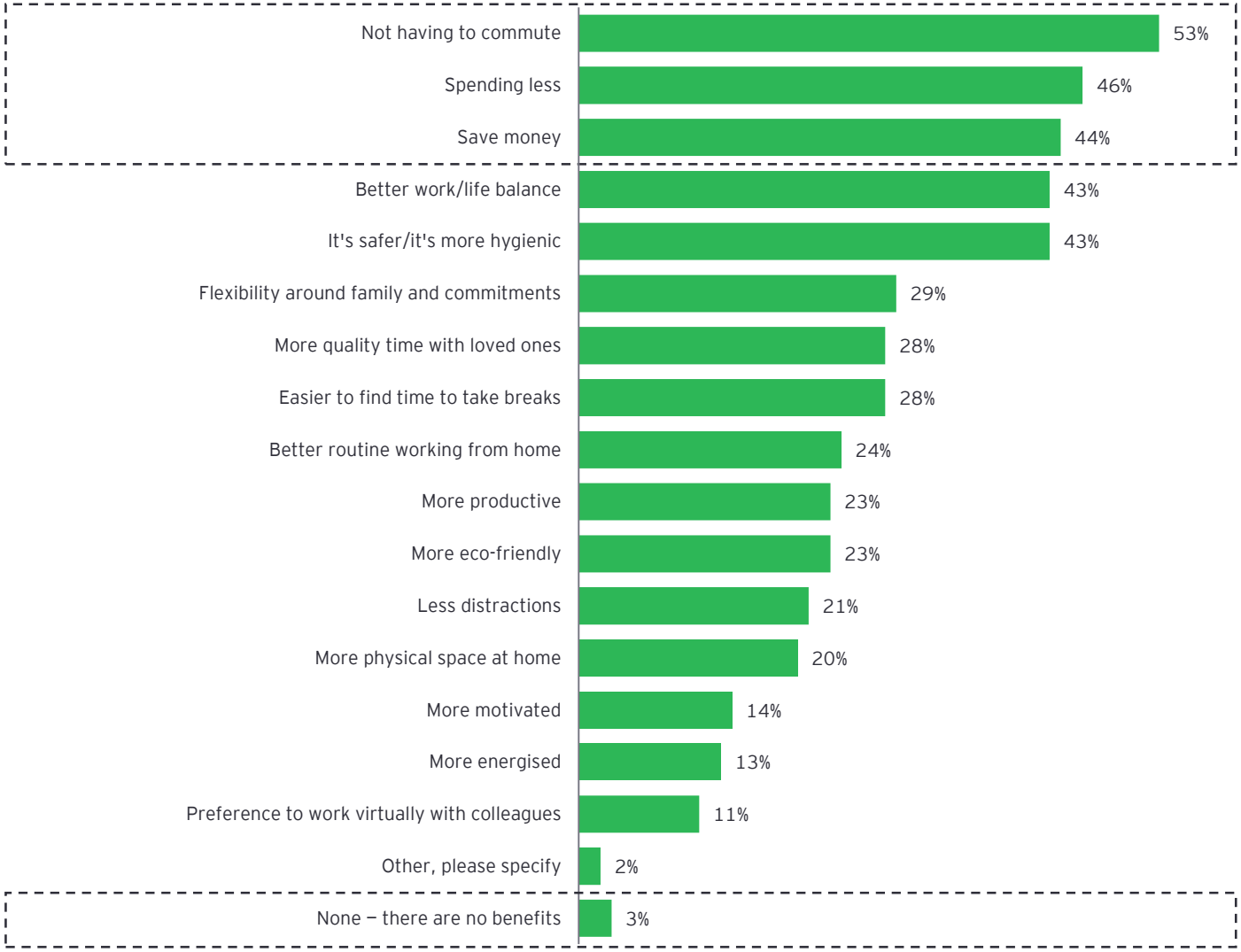
15%

of employees said there are no challenges to working remotely

Remote working benefits for employees

- In terms of benefits, the most commonly cited advantages of remote working are around the concept of **'savings'** (specifically 'time' and 'money'); **'not having to commute' (53%), 'spending less' (46%)** and **'saving money' (46%).** Whilst many employees have certainly experienced challenges with the loss of face-to-face work interactions and the increase in distractions, they have gained in other ways.
- On the previous slide, whilst we found employees stated challenges in separating the work and home spheres, the majority enjoy a **'better work/life balance' (43%)** and, perhaps unsurprisingly, a notable proportion appreciate the greater '**safety/hygiene' (43%)** of their home workspace.

Q10. What, if any, have been the main benefits with working from home for you during the COVID-19 pandemic? Please select all that apply. **(Base n=413).**

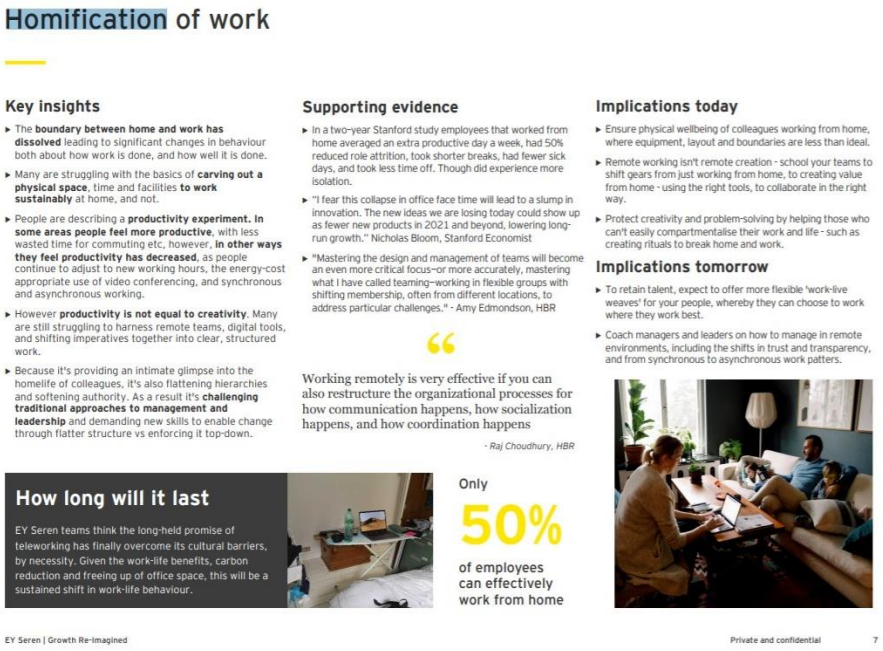


3%

of employees said there were no benefits to working from home

3. Digital everything

In previous editions we explored accelerated digitisation of services across sectors. In our quantitative study we went further to understand:



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EY Seren | Growth Re-Imagined

Private and confidential 7

Will consumers **sustain their digital behaviour** in the longer term and **how well are services delivering** on what's important?

48% of consumers are using banking services (personal or family) more digitally now than before COVID-19 pandemic restrictions began, with **around 4 in 5 customers** saying that they **are likely to continue accessing this service digitally** post-pandemic. However, the same cannot be said for healthcare services, where people expect to return to face-to-face interactions.

When asked about services more generally, consumers stated that **the most important thing they look for right now is 'hygiene and safety' but currently services are not doing enough to deliver on this.**

Digital adoption of services

Since the start of the COVID-19 lockdown there's been a shift in the proportion of consumers accessing and using services more digitally (particularly for retail shopping and banking). We've also seen a number of respondents state that they will continue using these services more digitally in the new normality.

Q16. Which of these services are you now accessing more digitally or virtually (e.g., using the website, mobile app or video chats) in life under lockdown? Please select all that apply; **Q17.** How likely are you to continue accessing these services more digitally or virtually post lockdown? (Base size n=969)

	Retail shopping: Household, grocery or personal	Banking: Personal and family	Healthcare: Check-ups and appointments	Sport, fitness and wellness	Telecoms: Phone and internet	Utilities: Energy and electricity	Insurance	Financial planning and wealth management
% of consumers using this services **more digitally** now than before the COVID-19 pandemic	50%	48%	30%	40%	41%	24%	38%	38%
% of those consumers who are **likely to continue using this services more digitally** post-COVID-19 pandemic	68%	82%	78%	75%	71%	83%	54%	65%
Potential shift in consumers (who use this service) **who will adopt greater digital use**	34%	39%	23%	30%	29%	20%	21%	25%

The top three triggers for greater digital adoption

The most common reason why consumers will exhibit greater digital adoption of services is because it's more 'convenient' using these services digitally vs. offline. We see greater variance for the second and third most common triggers but typically consumers cite 'quickness', 'accessibility'' and greater 'digital confidence' in using these services. Notably, greater perceived 'hygiene' is an important factor for 'retail shopping'.

Q16. Why are you likely to continue accessing these services more digitally? Please select all that apply. (**n=969**)

Retail shopping: Household, grocery or personal	Banking: Personal and family	Utilities: Energy and electricity	Telecoms: Phone and internet
It's more convenient	It's more convenient	It's more convenient	It's more convenient
69%	66%	58%	53%
I'm digitally confident doing this	It's more accessible	It's quicker	It's quicker
46%	57%	50%	51%
It's more hygienic/safer	It's easier to complete tasks/ activities online	It's more accessible	I'm digitally confident doing this
45%	50%	44%	43%

The top three barriers to digital adoption

However, when we look at the barriers to digital adoption we see that there is a reluctance amongst a number of consumers to continue using these services digitally and that people prefer doing things the way they did before. For a number of respondents, the face-to-face encounter is more personalised and the overall service experience is better in person.

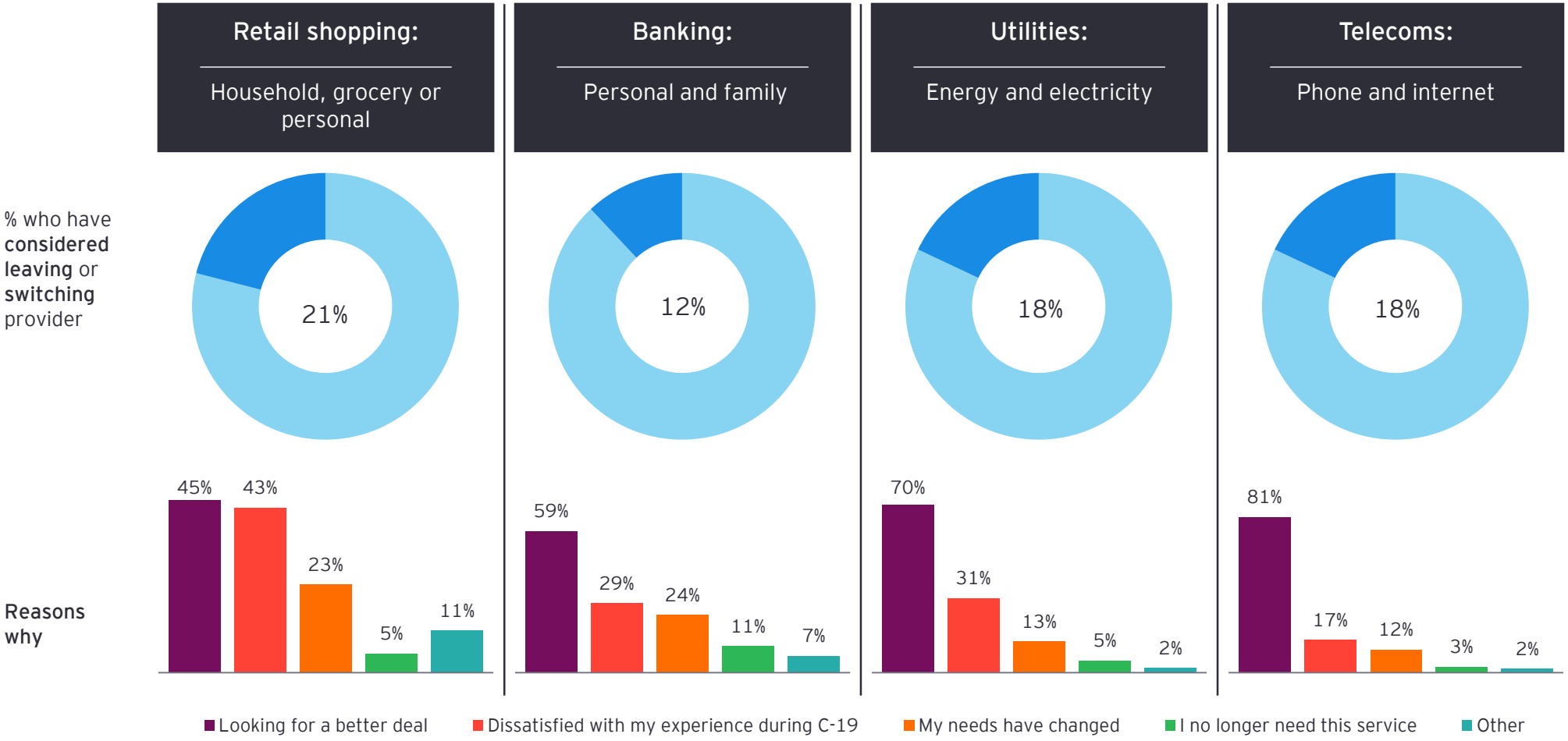
Q16. Why are you unlikely or unsure whether you'll access these services more digitally/virtually post lockdown? Please select all that apply. **(base size n=969)**

Retail shopping: Household, grocery or personal	Banking: Personal and family	Utilities: Energy and electricity	Telecoms: Phone and internet
Prefer doing things the way I did before	Service experience is better in person	Prefer doing things the way I did before	Prefer doing things the way I did before
39%	30%	26%	28%
Service experience is better in person	Face-to-face is more personalised	It's more difficult to complete tasks online	Face-to-face is more personalised
31%	22%	24%	21%
Face-to-face is more personalised	Prefer doing things the way I did before	Service experience is better in person	Service experience is better in person
27%	20%	17%	20%

Switching and leaving behaviours

Nearly one-fifth of respondents said that they'd considered leaving or switching their retail shopping (21%), utilities (18%) and telecoms provider in the past four weeks. Slightly fewer, just over one in ten, said that they had considered switching or leaving their bank. When probed on the reasons why, we see that the most commonly cited reason is because consumers are 'looking for a better deal'.

Q24. In the past four weeks, have you considered switching or leaving a provider within the following sectors?
Q25. What has motivated you to either switch or leave your provider?



‘Hygiene and safety’, ‘value for money’ and ‘transparent communications’ are the top three priorities for consumers right now

- However, when we asked how services are ‘performing’ on these three attributes, we see there is a substantial gap between importance vs. performance (‘hygiene and safety’ **-9**. ‘value for money’ **-13** and ‘transparent communications’ **-9**). This indicates that, at present, services are not delivering strongly enough within these areas and there is work to be done in order for service brands to bridge the gap.
- Unfortunately, we see notable gaps on nearly all attributes (the top 12 most important). It’s only when we look at the two least important attributes that we see parity (‘personalisation’ **+0**) or performance surpassing the importance of the attribute (‘innovative products/services’ **+1**).

Q20. How important do you consider the following attributes do be when thinking about the following service providers? **Q21.** How well are services provider performing on these attributes? **(base size n=969)**

R.O	Service attributes	Importance	Performance	Gap
1	Hygiene and safety	85	76	-9
2	Value for money	84	71	-13
3	Transparent communications	83	74	-9
4	Quality of service/product	82	74	-8
5	Customer service	81	72	-8
6	Ease of access (digitally)	81	76	-4
7	Employee and Community wellbeing	78	73	-5
8	Speed	78	72	-6
9	Customer disability support	77	70	-7
10	Ease of access (physically)	75	71	-3
11	Financial flexibility	72	71	-1
12	Sustainability and eco-friendliness	71	68	-2
13	Personalisation	69	69	0
14	Innovative products/services	68	69	1

4. Do I trust it?

We've previously discussed the element of trust during a time of uncertainty. In order to assist service providers in getting pre-pandemic levels of trust, in our quantitative study we asked UK population:

Do I trust it?

Key insights

Unsurprisingly, what people trust and distrust has changed. In some areas normal factors have accentuated, but in others new factors have arisen.

Economies and markets are founded on trust - so all the talk about "reopening the economy" will only be enabled by close attention to these.

Physical - surfaces, spaces and other people are all possible sources of infection and thus not to be immediately trusted.

Emotional - our ability to trust others comes down to judgements of whether they demonstrate competence, act with integrity, care about others and honour commitments. This is acute for new behaviours, such as digital usage or contact tracing apps, where emotional concerns around security are likely to need managing.

Perceived: time is a factor. People are willing to spend 10 minutes in close proximity to get groceries, but not two hours in a cinema, and much less a week on a cruise ship.

Prejudice: trust is determined through our "fast thinking"' brains, which are often caught up with unconscious bias and prejudice. This could lead to the exclusion of certain groups, e.g. minority groups who are affected significantly by COVID-19.

How long will it last

It takes a lot of mental and emotional effort to live in a world where you distrust everything. We're just not used to it. Providers who foster and signpost trust, allowing people to "get it on face value", will thrive. In other domains, there is potential for this latent mistrust to be negatively sustained in a culturally corrosive way, as blame for mistakes gets distributed and defensive "divide and conquer" strategies kick in.

78%

Want businesses to protect employees and local communities

Supporting evidence

"When we smell something putrid or "off" we tend to feel, and indeed signal, disgust, and whole areas of the brain, particularly the insula, are activated. Decisions such as what to eat, who to mate with, are influenced by such subtle non-conscious factors... What we know is that when in a state of stress or when sensing danger, we all tend to be more suspicious and less welcoming of others generally." - Dr Graham Music, Consultant Child and Adolescent Psychotherapist

"Employer communications are the most credible source of information about the coronavirus. 63% said that they would believe information from that channel... versus 58% for a government website and 51% for traditional media." - Edelmans' Trust Barometer Report

Currys PC World is planning to roll out a zero-contact Drive Thru model, so that customers can shop without entering stores.

Implications today

- It's not enough to be clean. You need to provide evidence of cleaning and a clear hygiene protocol - screens, sanitisers, floor markers - all of these provide a base level of comfort and reassurance.
- Given the BAME community is disproportionately affected by COVID-19, pay particular attention to your diversity and inclusion agenda.
- Use marketing content and outreach efforts that resonate with customers, and avoid the inauthenticity of bandwagoning

Implications tomorrow

- Clearly demonstrate that you prioritise the wellbeing of your customers and staff over financial concerns during the crisis
- If you've made missteps in your response, create an overt trust rebuilding strategy, to recover ground.
- Given COVID-19 is likely to last in social memory, return to your vision and mission, and ensure that trust plays a key role.

Human insights

"Who would want to go on holiday? I don't want to be the first jumping on a plane, going to a restaurant, I'd rather observe others first."

- Diary participant, Male 65

"When I went to Lidl, they were wiping over lots of things they had hand sanitiser as you walked in [...] it meant I didn't feel as dirty out today, I know that was probably in my mind before, but I didn't feel as grossed out."

- Diary participant. Female 31

"Some supermarkets will let only one person in, others have social distancing outside, and free flowing inside - we never went back there."

- Diary participant, Male 65

"Airlines are talking about spare seats in between passengers. But you still don't know what germs are around.

- Diary participant, Male 65

EY Seren | Growth Re-Imagined

Private and confidential 5

Who do people rely on for guidance and what will restore confidence in sharing physical spaces.

Looking at the results, we see divided views on trust. **11% of respondents do not trust any source of information,** advice or guidance right now (this includes the government, scientists, family, friends and doctors amongst others).

In terms of **sharing physical spaces, the most commonly cited factor consumers said they needed were 'social distancing markers' (55%) with 6% saying that nothing will help them feel confident in sharing spaces and 8% happy to share spaces regardless of what actions are taken.**

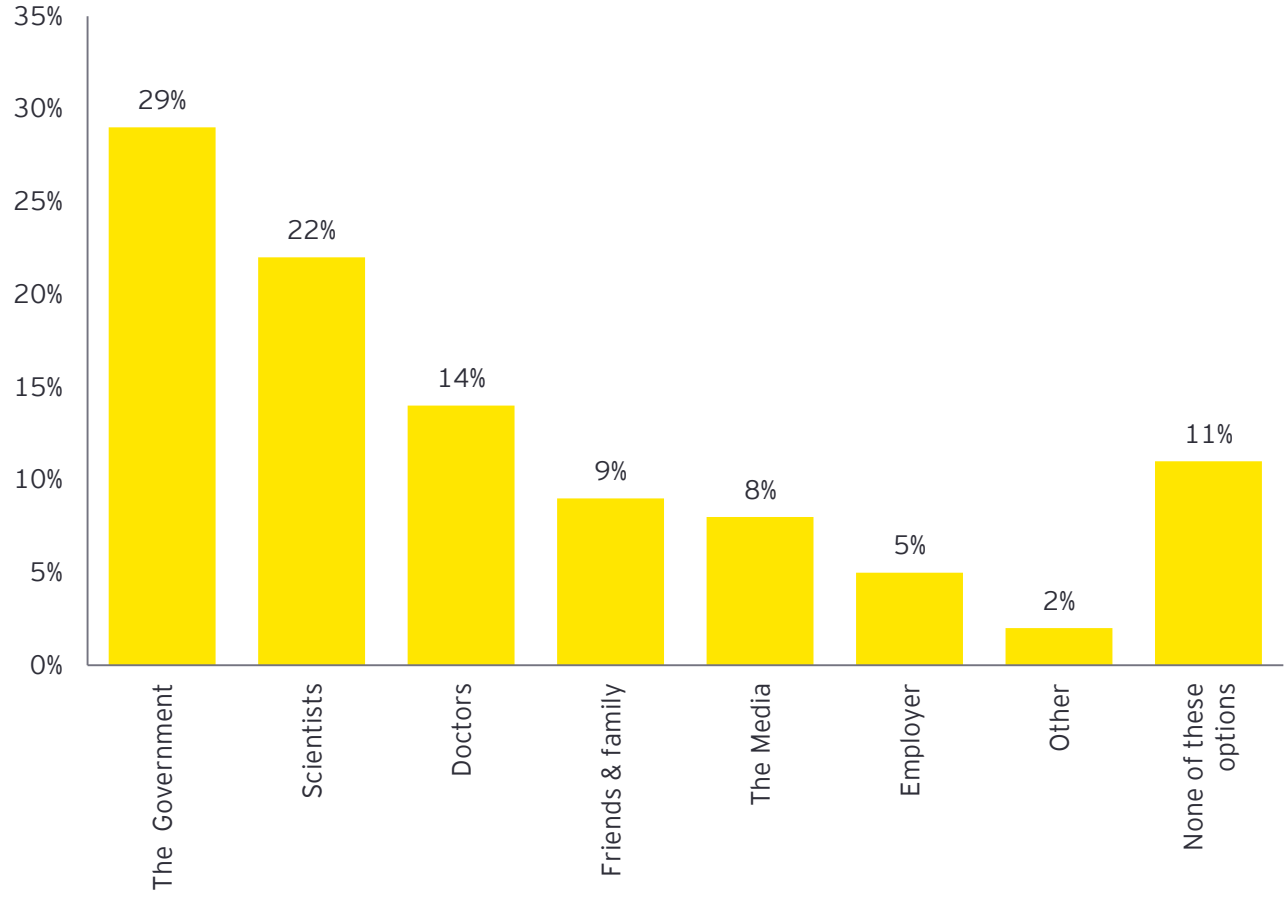
Trusted sources of information

COVID-19 has created **a tidal wave of information** and **misinformation** where, now more than ever, people are wondering **who they can turn to** for **reliable facts**. According to an opinion poll by Open Knowledge Foundation, **51% of the UK population** have said that they have been **exposed to 'fake news'** about COVID-19 particularly on social media sites such as Facebook, Twitter or Instagram.

Additionally, **public trust** in the UK government as a **source of accurate information** has fallen considerably (particularly in light of the Dominic Cummings affair). Our research precedes this point in time and so one can only imagine that people's faith in the government as the most trusted source of information would now be considerably less than our results show.

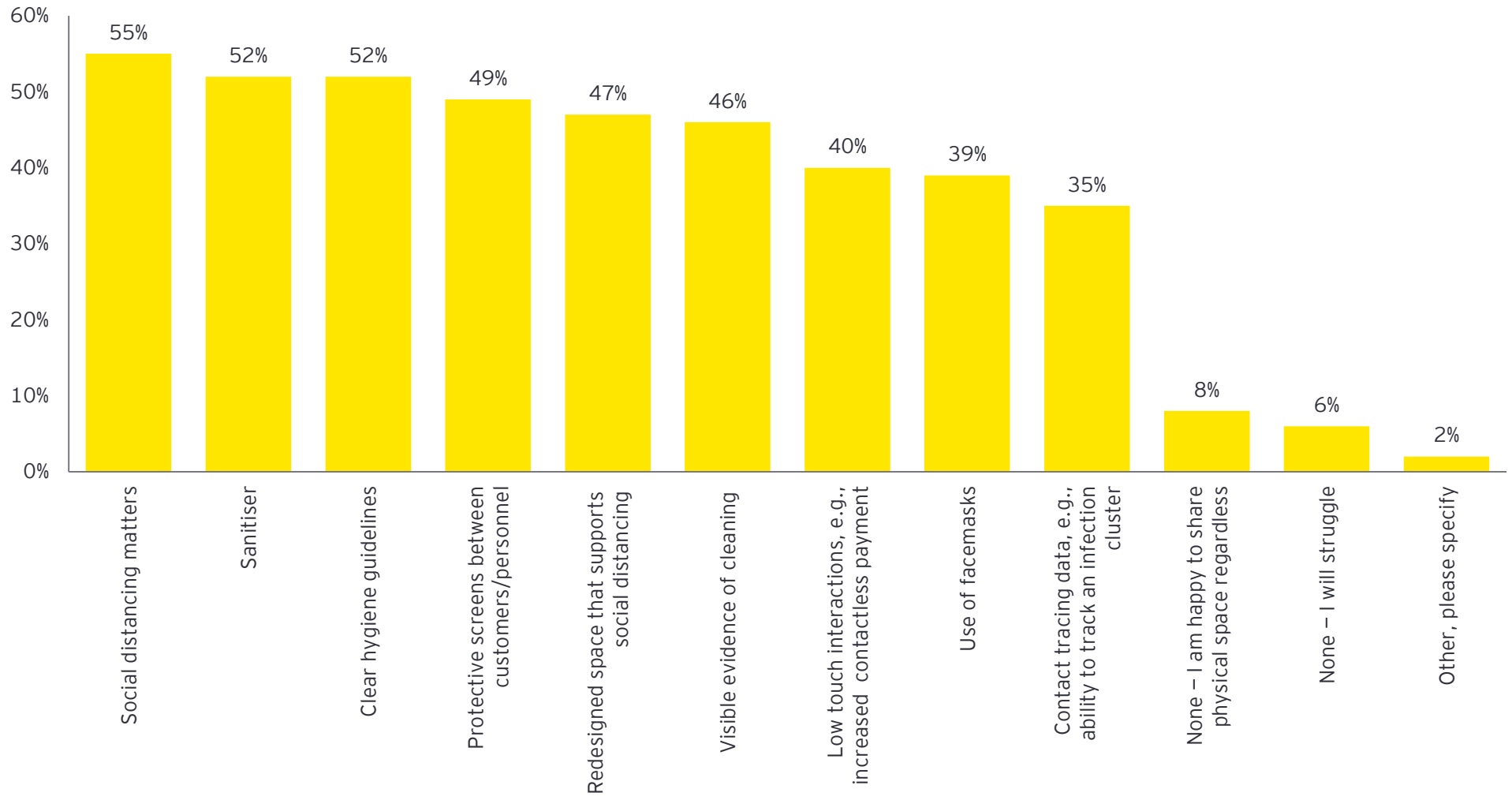
Q20. How important do you consider the following attributes do be when thinking about the following service providers?

Q21. How well are services provider performing on these service attributes? **(base size n=969)**



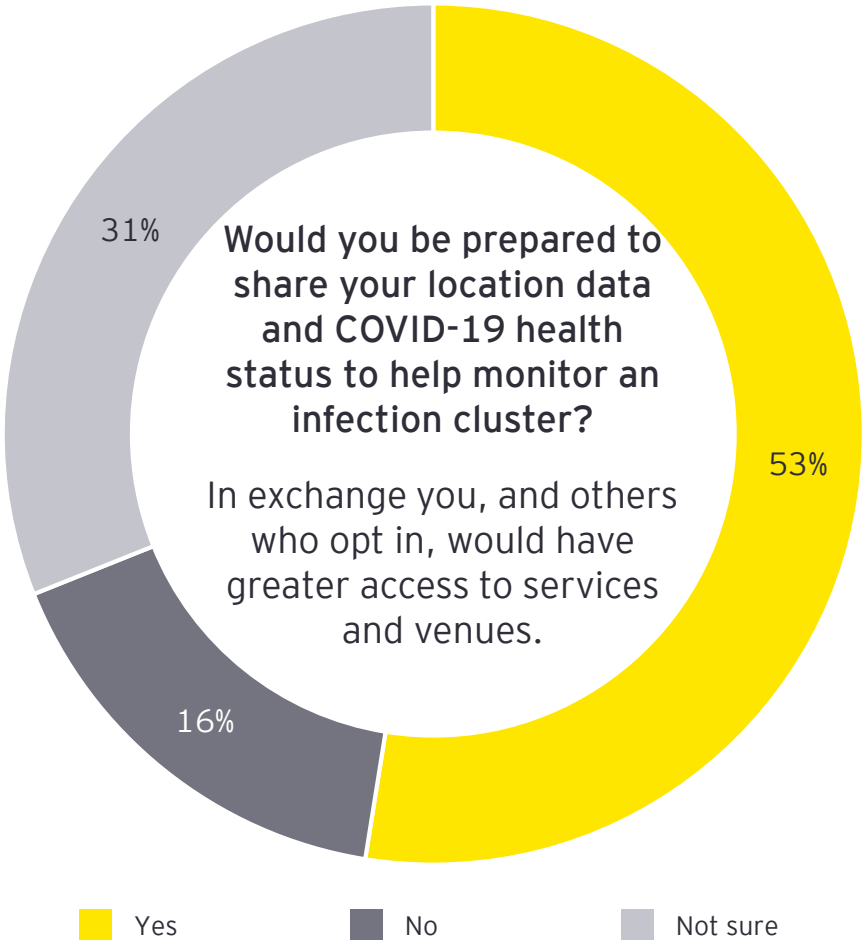
Trusted sources of information

Q30. What factors would make you feel safe to go back to sharing physical space with others? Please select all that apply



Contact tracing

The majority of participants are complicit with the concept of 'contract tracing' which indicates that, despite the sharing of locational and health data, the general population are predominantly positive towards the notion of data sharing. However, there is a notable proportion who are unsure of the idea (31%) and would need more information before deciding.



Q31. Would you be prepared to share your location data and COVID-19 health status to help monitor an infection cluster?

Q32. Please tell us why you gave the answer you did.

No to contact tracing:

"The information to be collected by the tracing app in the UK is an invasion of privacy."

Not sure about contact tracing

"I do not like to share my location under any circumstances and as I am in total isolation, I'm not sure how helpful my data would be. I would need to know more information about this."

Yes to contact tracing

It makes sense to collect as much data as we can. I already report daily via the app and would be happy for location tracking also.

Contact tracing is the process of identifying someone who is at risk of COVID-19 infection; this is most likely because this person has been in close contact with someone who has tested positive.

In recent weeks the Government has abandoned plans to further develop a contact-tracing app and, instead, will switch to a model encouraged by tech giants Apple and Google. This is on account of the unreliability of the Bluetooth signal on which the app depends on.

Whilst there have been some teething issues with the app in recent times, there is a willingness amongst the majority people to share their data (53%) in order to help monitor an infection cluster.

Using consumer and colleague mindsets to inform your response

The value of mindsets

As well as conducting regular customer research, most design organisations also use customer personas or other representative archetypes. These act as proxies to different customer types, as there's rarely enough budget or time for continual research. Instead design teams work with personas to continually ensure they're designing for the needs of others, and avoiding the bias of designing for self.

We often explore mindsets before producing personas, so thought it would be useful to share a set of customer and colleague mindsets here. These have emerged from all of our COVID-19 pandemic Human Signals research to-date, as pretty consistent clusters of preferences, shared by relatively distinct cohorts of people.

Given you're likely to have your own personas, relevant to your organisation, service, or product, our suggestion is that these mindsets act as an input into those, to stimulate thinking about how personas may need to adjust in light of the crisis.

Consumer mindsets – based on our research

We predict a million new normals emerging from this pandemic – but within this context, what new patterns of behaviour are we observing? Analysis has shown us a set of consumer mindsets that can be used to inform ways of better serving your customers as we all navigate post-lockdown society.

1 Optimistic and adaptive

Will often have retained key elements of their normal lives, e.g., their employment and therefore needed to adapt to new contexts for the purpose of continuity.

- Likely to have experienced minimal impact on their financial situation and been able to build their savings
- Self-guided information-seeking behaviours, will do their own research into current context, trusts the science
- Duty of responsibility to self and others is strong so may experience internal conflict at any compromises to rules
- Has observed the benefits of new ways of working and living – likely to be selective in choosing which patterns of consumption they will return to

2 Purpose driven and altruistic

Has used the experience of the pandemic to reflect on their current lives and build a deeper understanding of their personal values and what is most important to them.

- Likely to have displayed altruistic behaviours such as volunteering and supporting others in their community
- Increased time with family (or separation from family) has deepened relationships and given insight into each others' days
- A desire to live with intention on emerging from the COVID-19 pandemic and hopeful for society in the future
- Seeking honesty, transparency and ethical behaviour from services and providers – will actively avoid those displaying 'bad behaviour' during the COVID-19 pandemic

3 Entrepreneurial and opportunity-seeking

Likely to have been placed into a position of needing to pivot due to their working context, e.g., employment is volatile (freelancing) or they are on furlough.

- Likely to have been actively considering significant life decisions about their work, or on the cusp of doing so (e.g., retirement, new business/side hustles)
- Priority is on creating their own new sense of security
- Demonstrating proactive behaviours to manage their financial situation and plan ahead, e.g., negotiating with existing service providers
- Focus is less on large-scale societal change but small changes in behaviours such as spending money with independent businesses

4 Pragmatic and adjusting

Will have experienced significant change in their lives, such as redundancy but likely to have access to resources such as savings and support from others, e.g., partners.

- Actively making changes to their lifestyles to manage their finances, focusing on the necessities
- Taking a shorter term view and making adjustments as the situation continues
- Although they have sought reductions in bills, rent and mortgage payments, there is a lack of trust in financial service providers (e.g., banks/credit card providers) – a fear credit will be pulled if they see any signs of struggling
- At high risk of slipping into a financially vulnerable situation if support and savings dwindle

5 Conflicted and cautious

Likely to have experienced significant disruption to their lives, e.g., redundancy, isolation, etc. that is exacerbating existing vulnerable circumstances such as poor health, etc.

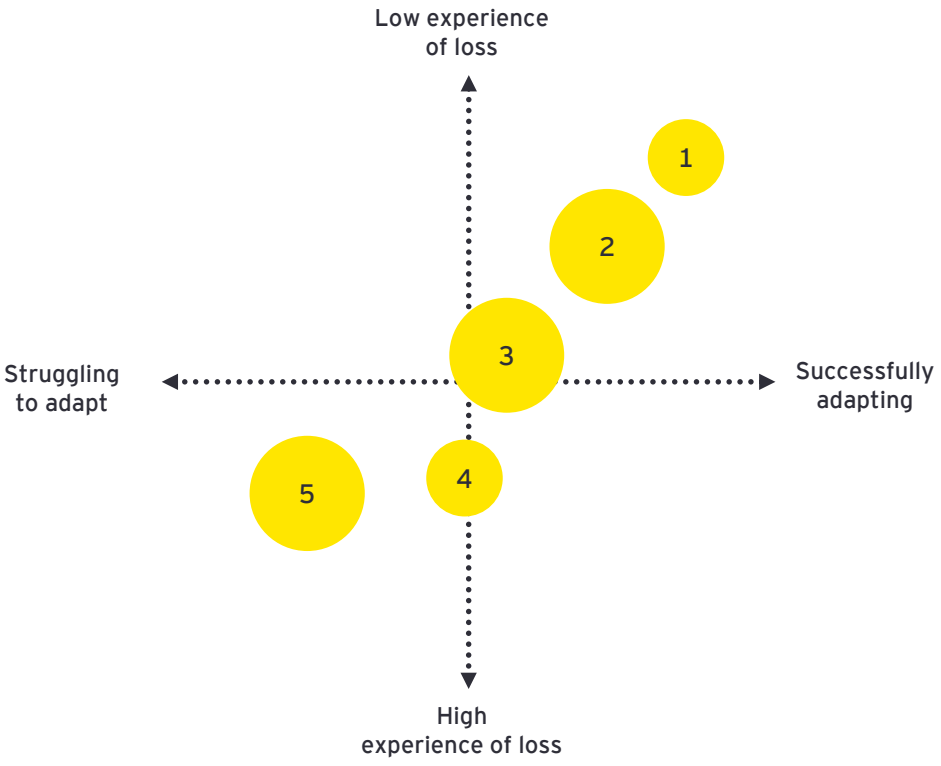
- Longing for their previous life and struggling to adapt to this new context – experiencing strong sense of loss
- Seeking a return to normality but also cautious and hypervigilant – is seeking guidance that has clarity rather than dealing with shades of grey
- Has low levels of trust in others and can display a reluctance to seek help from service providers, especially those financial services due to low awareness

Consumer mindsets – applying them

How the consumer mindsets breakdown across dimensions

Work with frameworks

To create our mindsets, we worked with two of the most significant themes from this research – the need to adapt and the impact of loss – and used these to map and frame what we have been hearing from our primary research to build new understanding. Work with the themes that have the most relevance for your customers and service to build a better understanding of how to serve them.



Apply emergent COVID-19-specific dimensions

Through all of our research, we have noticed dimensions emerging that need to be considered – some of these are new, e.g., vigilance around the new social norms such as social distancing/wearing a mask vs. complacency and a disregard for these (all of which will impact on the in-life experience of services). Others have always existed but the pandemic has thrown a spotlight on the urgent need for these to be addressed, e.g., digital exclusion. Use these dimensions alongside your existing material to explore the impact of the COVID-19 pandemic and how to meet their new and existing needs.

Fearful and anxious	◀ ⋯ ▶	Hopeful and measured
Digitally excluded	◀ ⋯ ▶	Digitally connected
Low access to resources, e.g., support/savings/ information	◀ ⋯ ▶	High access to resources, e.g., support/savings/ information
Isolated	◀ ⋯ ▶	Connected
Complacent	◀ ⋯ ▶	Vigilant
Reluctant to seek help	◀ ⋯ ▶	Comfortable seeking help

Consumer mindsets – based on our research

The COVID-19 pandemic has significantly impacted the way we work. Whilst every employee's personal circumstances are unique, our analysis reveals a set of colleague mindsets. Use these to inform your organisation's strategy for adapting to the new realities of a post-lockdown working world.

1 Change embracers

Adaptable and resourceful, they have used the lockdown as an opportunity to trial new ways of working, managing and living.

- Has realised benefits changes have brought and is keen to hold on to them, e.g., new digital tools, remote working, flattened hierarchies
- Required minimal employer support
- Experimented with different management/leadership styles
- Expectation of trust and autonomy to balance role performance with other commitments, e.g., family, leisure
- High appetite to trial new workplace operating formats
- May desire to integrate volunteering and community work into schedule

2 Stay at home-ers

Independent and resilient, they have established a remote-working habit that works for them, and hope to sustain this.

- Maybe in a COVID-19 high-risk group
- Configured a comfortable home-office work environment
- Likely to have high access to resources, e.g., financial, secure housing, support network
- Likely to have considerable care-giving responsibilities.
- Happy and productive working independently and/or in quiet isolation
- Wish to make remote working the 'new normal' supplemented by occasional days physically in the workplace

3 Eager to resume 'normality'

Working remotely has been a challenge due to personal circumstances and/or capacity for behaviour change.

- Found it difficult to adapt to major change in routine and less structure
- Eager to resume office customs and rituals, e.g., lunching and socialising
- Maybe making do with less than ideal home working environment, e.g., desk space, fast broadband, quiet areas
- May have low access to resources, e.g., financial, informational, etc.
- Unhappy working in quiet isolation – craves workplace atmosphere
- Desire to return to workplace stability outweighs concerns over potentially higher risk of virus exposure

4 Cautious and vigilant

Reticent to return to office before new workplace models proven, but keen to re-establish in-person interactions.

- May have been personally impacted by the COVID-19 pandemic, e.g., family bereavement
- Slower to adopt full virtualisation/digitalisation of role
- High adherence to physical distancing
- Unwilling to be amongst first 'guinea pig' office returners
- May rely on public transport for commuting and are not comfortable with this environment yet
- Need for employer reassurance around hygiene and safety
- Responds well to clear and supportive workplace comms

5 Furlough returners

Returning to the workplace after furlough, these employees have unique needs and require orchestrated re-introduction to pandemic working.

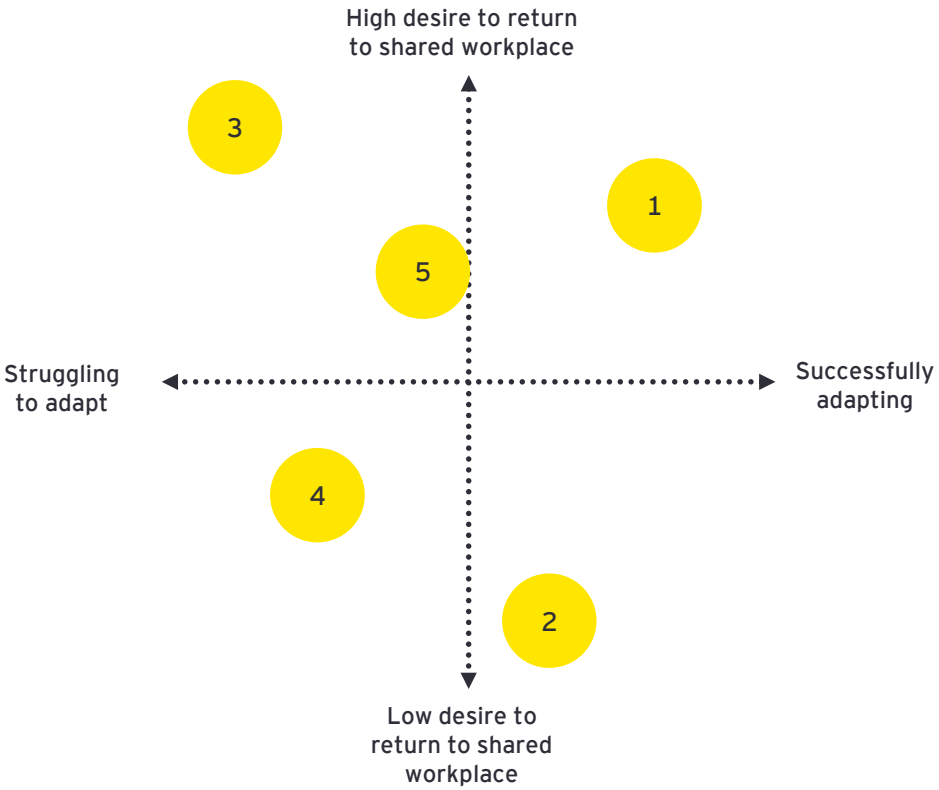
- Keen to contribute after a period of inactivity and feeling unproductive
- May have concerns about the future viability of their role
- Potentially less experience of remote working tools and protocols
- May need targeted learning and development interventions to ensure skills match new working practices
- Will benefit from mentoring to ensure career goals on track after furlough

Consumer mindsets – applying them

How the consumer mindsets breakdown across dimensions

Work with frameworks

We mapped colleague mindsets against two key factors from this research – the desire to return to a shared workplace and the ability to adapt. Try mapping your employee groups against themes that have the most relevance in your organisation to build a better understanding of how to serve them.



Apply emergent COVID-19-specific dimensions

The Human Signals research has identified new dimensions to consider when designing for employees and developing 'return to workplace' strategies. Use these dimensions alongside your existing material to explore the impact of the COVID-19 pandemic and better understand how to meet your employee's new and existing needs.

Home environment not conducive for working	◀ ····· ▶	Home environment conducive for working
Requires flexibility due to caregiving responsibilities	◀ ····· ▶	No caregiving responsibilities
COVID-19 high risk group	◀ ····· ▶	COVID-19 low risk group
COVID-19 low risk group	◀ ····· ▶	Comfortable working in shared environment
Thrives with supervision and/or guidance	◀ ····· ▶	Works effectively without supervision
Low desire for informal workplace socialising	◀ ····· ▶	High desire for informal workplace socialising
Less need for visibility, e.g., established career	◀ ····· ▶	High need for visibility, e.g., for career building

Looking at the crisis sector-by-sector

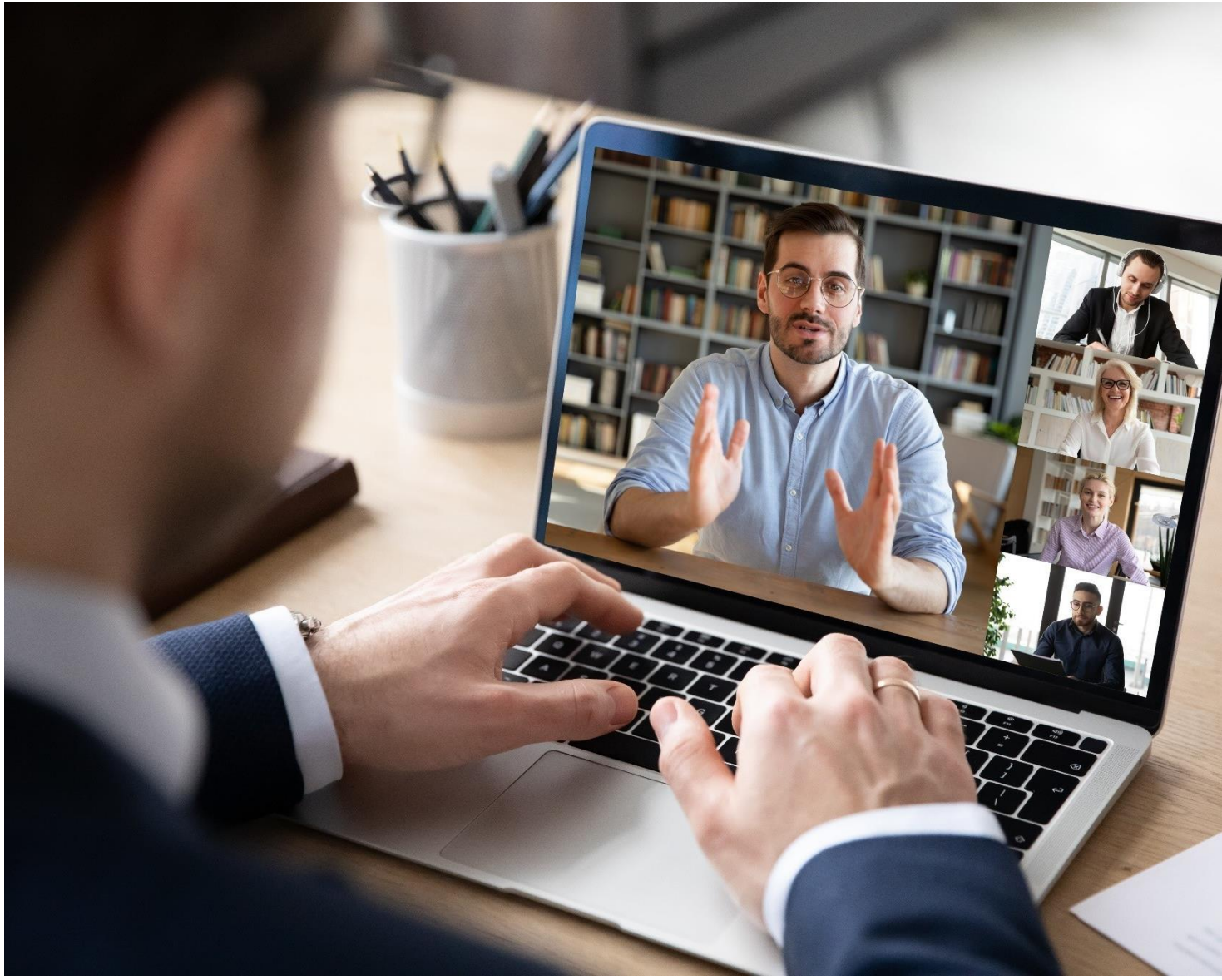
COVID-19 in different sectors

At EY Seren, we're privileged to work with clients across sectors.

Throughout the COVID-19 crisis we've been working with client teams to:

- Pivot live engagements to the new reality
- Adapt to virtual ways of working
- Explore new customer and colleague needs
- Identifying growth opportunities in the 'new normal'
- Researching, designing and building services to meet the needs of people today and tomorrow

In this section we surface some of the things our sector-specialist teams have learnt.



Healthcare

The COVID-19 pandemic has accelerated patient adoption of new technologies and a willingness to share data which previously stifled a switch to a virtual first interaction with healthcare professionals.

Even with this new willingness to interact via digital channels people are gravitating towards brands with a sense of purpose that provide meaning and foster trust, more than ever before.

In the coming months there will be a growing focus on self care, with a preventive health attitude across mental and emotional wellness, including diet, supplements, natural remedies, exercise and even personal care products that relieve stress, boost immunity and enhance wellbeing. Over 80% of Americans intend to be more mindful about regular self care practices after the pandemic.

However, in this environment health inequalities need to be recognised, especially as not everyone will be able to invest in their own self care nor have access to the latest digital channels to interact with health professionals. This is prompting a need to consider social determinants of health and to adopt patient-centric approaches which are joined up with traditional access points.

Polls show that healthcare workers are feeling more understood and valued by their peers who have a deeper understanding of and appreciation for their role.

How the sector has responded

Rapid response by the health ecosystem: Fighting the COVID-19 pandemic through research, innovation, technology and collaboration

New innovations and public-private ecosystems are emerging with experiences, data, technology and agile delivery to adapt to the changing patient journeys

A more expansive reimagination of brand purpose: organisational role within broader public health

> “Consumers absolutely expect more from retailers — not just to show up and sell them products but to demonstrate their values.
>
> – Nick Collard, Holland & Barrett’s Chief Customer and Digital Officer

Where next?

- Strengthen trust and confidence in digital channels to enable the health service to accelerate change
- Empower individuals from all backgrounds to focus on healthy habits via continued guidance and support
- Address health inequalities, by ensuring that the accelerated adoption of digital is inclusive
- Build brands with purpose, agility and transparency, framing a larger role for organisations within the public health ecosystem
- Build new business models to create thriving health ecosystems via community outreach, public sector partnerships and private sector expertise

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Life sciences

Due to the COVID-19 crisis response, HCPs (health care professionals) have **minimal time to source medical information** from pharmaceutical sales representatives.

At the same time, well-established patients' journeys have been heavily impacted, and **HCPs are likely to struggle to adapt at speed to provide the same level of care to their patients across disease areas.**

As a result, virtual channels might be the only viable engagement option for many HCPs. This disruption accelerates healthcare ecosystems into the Next and Beyond horizons, requiring a **strategic shift from the established operating models, changing the way HCPs and Sales Force work and interact.**

As for colleague experiences, field force representatives are **conflicted among the excitement of changes and the anxiety of the uncertainty** about their future role.

The level of **trust in their wider organisation** plays a key role as changes are implemented into the traditional commercial model. The model might rapidly moving to a new normal, where the digital customer experience is not only their new way to deliver value to HCPs, patients and their organisation, but are also critical to sustainability and growth.

How the sector has responded

Pharma companies may need to swiftly evolve their way of engaging with their customers by introducing new capabilities for virtual field force, upskilling sales people for the virtual world and invest in the creation and integrations of a variety of new virtual channels. In this scenario, **they will be re-training and re-purposing their sale organisation,** to obtain rewards from virtual interactions and taking a more active role in the delivery of healthcare services to **lift the burden of the COVID-19 pandemic from the health system.**

One of the top 10 Pharma companies wanted to build a framework for their countries business functions to locate themselves in different scenarios, depending on the level of impairment brought to their customers' interactions. In each scenario field force representatives are supplied with a series of smart resources to re-enable HCPs engagement and activate healthcare support.

> "Smart resources can prepare our field force for the "next", when COVID-19 disruption subsides and digital tools need to be readily deployed. Our organisation need to improve the understanding of customer needs, triggering precise customer segmentation, reaching them when, where and how they need
>
> – Head of Global Commercial Excellence, Top 10 Pharma Co

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Accountancy and finance

Empowered to assist and lead change in a post-COVID-19 pandemic world. The initial state of shock was quickly replaced with a need to provide the highest level of assistance to their clients/employers. Despite large scale employment loses, many in the industry were busier than ever as they tried to help with keeping businesses afloat, interpreting government advice and then passing it onto clients/employers. It was felt that only those with accounting/finance skills had the appropriate skill set to assist in the initial volatile macro environment and influence change into a community after the COVID-19 pandemic.

Expansion of client/network base. The use of digital tech enabled professionals to maintain the client relationships, including not just meetings, but transfer of sensitive document via secure portals, access to forums/online communities to get information of government advice. These often sprung up organically, started by a few innovators. Technology has also allowed some professionals to expand their customer base by having access to larger geographic areas, not previously serviced.

When compared to March,

66%

of Management Accountants and Personal Accountants do not feel in control of their future as of May 2020 (n=158)

Locus of control remains a concern

Dealing with the "what now" question is a cause for concern for many professionals. They crave clarity and direction on future financial and political landscape for themselves, their employers and their clients.

How the sector has responded

At the start, accounting and finance practitioners were challenged between maintaining current service provisions, yet being asked to deliver additional services outside the normal scope, including the softer skills (i.e., advisory).

This has been an opportunity for some within the profession to consider expanding their service offering and developing the 'wingman' function for their client/employer as the world steps out of the immediate COVID-19 crisis and into an uncertain future.

80%

of Management Accountants and Personal Accountants feel they have adapted well to the challenges from the COVID-19 pandemic (n=158)

45%

of accountancy professionals in the US have seen an increase in demand for Advisory services since March 2020. All other service offerings have seen a demand decrease (n=328)

"

We need to see the development of the Financial Leader....finance people have a unique position within an organisation to lead change... (why), financial people get involved in everything and they speak the language of 'business'...it's a bit like speaking English.

– Senior CIMA member, UK

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Financial services

The health crisis and subsequent lockdown triggered a money crisis for many people across the country who suddenly needed to rethink their day-to-day spending, mortgage and loan payments. At the same time, valuable government schemes kicked in, all of which put high demands on individuals to understand what they could get and how to get them. Given UK numeracy and financial literacy rates, and the growth in overall customer vulnerability, this led many to feel they needed help understanding their options and making decisions.

Banks and other financial service providers experienced a wave of complex demand into call centres, with those trying to self-serve experiencing limits to what could be done online, and those used to visiting branches unable to leave the house.

Many organisations rapidly shifted their focus to designing and building improved digital journeys for key vulnerable groups, as well as innovating branches

> This crisis proved that everything we've done since 2008 to become more digital and more agile was money well spent. We weren't perfectly set up for this crisis by any means, but I shudder to think what our response would have been without all the hard work of the past 12 years.
>
> — Senior Leader, UK Bank

How the sector has responded

Digital (virtual) power up. Financial services have invested heavily in digital transformation so were able to pivot existing design and build activities to new priorities, such as building digital solutions for vulnerable customers, or digitising demand to take pressure off the call centre. In particular a great deal of experimentation has occurred within branches, adopting video conferencing to deliver outbound contact to vulnerable customers in the local area. Such experiments have reframed the value of channel diversity in an rapidly omnichannel world.

Finding agility everywhere. The crisis acted as a bit of a shot-in-the-arm for digital programmes. Agility quickly moved from being a side-line agenda, done to software or by designers, to the frontline, where everyone was adapting fast to what the customer needed as service demand skyrocketed and shifted overnight to apps, online and call centres.

Value beyond transactions. Banks and financial service providers have been under pressure from FinTech and big tech disrupters to justify their existence and purpose. However, for many, the COVID-19 crisis appears to have reaffirmed the value of having a relationship with a provider who has people on hand to explain things and help decision making as well as support customers and businesses through moments of deep uncertainty, vulnerability and financial difficulty. Legacy and scale have become a differentiator.

Leading with purpose. Financial services leaders have described a renewed sense of purpose within their organisations, with many at the frontline feeling they've worked as keyworkers in an additional emergency service, to help customers through the crisis. The opportunity now is to protect and leverage that new spirit through any headwinds of the economic downturn and shift the operating model towards digital and virtual resilience and responsiveness and focus on helping people navigate uncertainty with the confidence they are making better financial decisions everyday.

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Public services

There isn't a single sector of society that has not been affected by the COVID-19 pandemic and Government's response has mirrored this wide-ranging impact. This has been a unilateral call to action for Departments and the Cabinet Office drives a multi-prong approach to battling the pandemic.

Central Government has pushed out a wide-range of measures through citizen-facing channels such as UK Research & Innovation (small business support) and HMRC (Self-Employed Income Support and the Job Retention Scheme). These have been mobilised in record time and used existing channels and relationships.

Departments have re-focused and re-prioritised their support to businesses and citizens. Often stopping or slowing down non-COVID-19 crisis related services.

Government has actively engaged with business through a wide range of forums and is quite clearly acting in partnership with the private sector. The information flow to the public has been steady and fact-based.

The work of public servants has been reshaped radically — from deliberative, consultative and incremental to Teams/Google Hangouts by default.

New norms of conduct and collaboration are emerging as staff readjust to working remotely and keeping up the drumbeat of business as usual (BAU) delivery in unprecedented circumstances.

Non-digital colleagues have rapidly been converted to working via Teams, squashing any hold-outs to Digital by Default. In many chases face to face services have switched to online overnight.

How the sector has responded

Home-working by default has changed perspectives on new technologies

Rapid adoption of remote working and technology has changed perspectives on what public servants need to develop sound policy.

This has increased interest in tech like automation or AI. Where previously colleagues had longer to collate, cleanse and analyse data the policy cycle has sped up significantly.

There is a heightened awareness of the pain associated with assembling large data sets. Having good, verifiable data to hand is imperative.

Case handling — from in-person to via Zoom

There has been a revolution in thinking about how relationships are best maintained with large amounts of traditionally face to face work transitioning seamlessly to video-conference.

Public servants traditional preference for in-person relationship management has transformed into an ease with different VC formats and using collaboration functionality.

The key question will be whether this can be sustained and whether organisations will embed the benefits realised. How will video-conference fatigue be addressed? How will COVID-19 ways of working enrich in-office or in-person working?

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Utilities

The COVID-19 pandemic is propelling a new green generation. 51% of people aged 35 and under indicate that the crisis has made them more aware of sustainability and environmental issues.

It's also opening up new opportunities for providers, to innovate the services they offer to customers. 42% of consumer aged 35 and under are willing to pay a premium to use a sustainable home energy provider.

It's also driving greater focus on forging local community ties. 63% of consumers indicate that the COVID-19 pandemic will make them more aware of the benefits of supporting local communities.

"

'The economic and environmental advantages of investment in a green recovery are aligned as never before

– Leader, UK Energy company

How the sector has responded

Virtual customer service is now BAU. EDF moved to virtual/remote customer service operations in less than a week, and focused on helping customers who are elderly, vulnerable or on prepayment meters

The crisis has further opened opportunities for agile disruptors. Neo Energy is a start-up challenger brand who launched an offering of free electricity in June and July. They offer contract-free rates, no exit fees, 100% renewable energy and a payment waiver option within your tariff, should you fall into difficult times and are the first UK supplier to accept digital currencies.

Walking the green recovery talk. Scottish Power, the first company of its kind to go 100% green, is poised to invest billions in the UK's renewable energy industry in the coming years, including an onshore wind renaissance.

Where next?

- Expect new industry benchmarks and heightened customer expectations of company funded green investments.
- Expect growth in new, innovative, digital first, sustainable utility propositions.
- Expect greater targeted support of vulnerable segments and increasingly commonplace decentralised contact centres.

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How to look back and assess your COVID-19 pandemic response to-date

Looking back to look forward: assessing your response to this first wave is key to delivering durable change should a second wave hit

The COVID-19 pandemic has forced businesses and organisations to transform

Crises drive change	**With crises past, we've seen that even as things recover, each crisis leaves behind permanent behavioural shifts in individuals, businesses and societies.** The 1918 Global Flu Pandemic toppled empires, the Global Recession of 2007-2009 led to the formation of the largest startups of today and this crisis will be no different.
Transformation is underway	**Some businesses are reporting having made more transformational change in the matter of a few weeks than in the past ten years.** The case for adopting some of these innovations beyond the COVID-19 pandemic is clear, but the first step must be to identify the ways in which your business has changed and assess their relative merits.
Seize the opportunity	By understanding what processes, behaviours and risks changed during the pandemic; what worked well and what didn't; **organisations can seize this opportunity to create a simpler, leaner and more efficient new normal during and beyond the COVID-19 pandemic.**

"The secret of change is to focus all of your energy, not on fighting the old, but on building the new."

– Socrates

Through conversations with clients, we've identified five lenses to establish focus, identify opportunities and implement change:

People

What has been the impact on my workforce?

What changes will lead to a more efficient and purpose-led workforce of the future?

Process

How have processes changed or simplified during the pandemic?

What have been the efficiency and risk impacts of these changes?

Technology

How has technology and system usage changed?

How did technology enable the transformation to digital and flexible operations?

Governance and controls

How has the control framework changed during the pandemic?

How do we retain a balance between controls and agility?

Customer & Digital

How has the adoption of digital channels changed?

How do we help ensure the right outcomes for customers?

A rapid hypothesis-led approach to minimise the uncertainty around the COVID-19 pandemic, enabling you to respond with agility and confidence

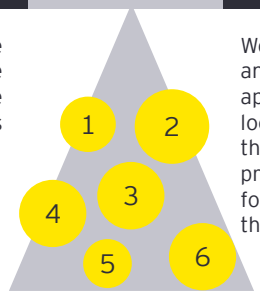
Our approach

Business implementation of recommendations

Feedback and update

COVID-19 TO DATE | 5+ weeks | 3+ weeks

Throughout the engagement we will take each lens in turn to drive the sprint activities



Working in series of sprints and using a hypothesis-led approach we will take a look at your business through each lens and provide recommendations for you to implement within the business.

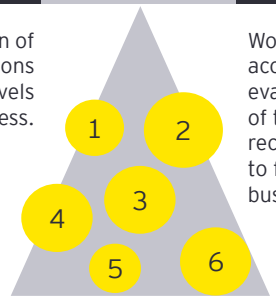
Lookback 1: Diagnose and recommend

STOP | START

CHANGE | CONTINUE

1. A live, online report with tested hypotheses, quick wins, immediate risks and issues and rectifying actions summary data and insights for each lens
2. "Call to action" workshops to drive tangible actions based on sprint findings
3. Engagement level KPI framework for the business to measure the success and ongoing tracking of changes following implementation
4. Wider recommendations to inform what longer-term opportunities that can be used to shape the business's ongoing improvement strategy

The implementation of our recommendations will have varying levels of success.



Working in a series of accelerated sprints we will evaluate the performance of the business against our recommendations for you to feedback into the business

Lookback 2: Measure and evaluate

GREEN | AMBER | RED

1. A live, online report showing an evaluation of the application of our recommendations from initial lookback
2. Evaluation workshop back to the business to highlight areas for further improvement

Our design principles

Actionable	Measurable	Testable	Evidence-based

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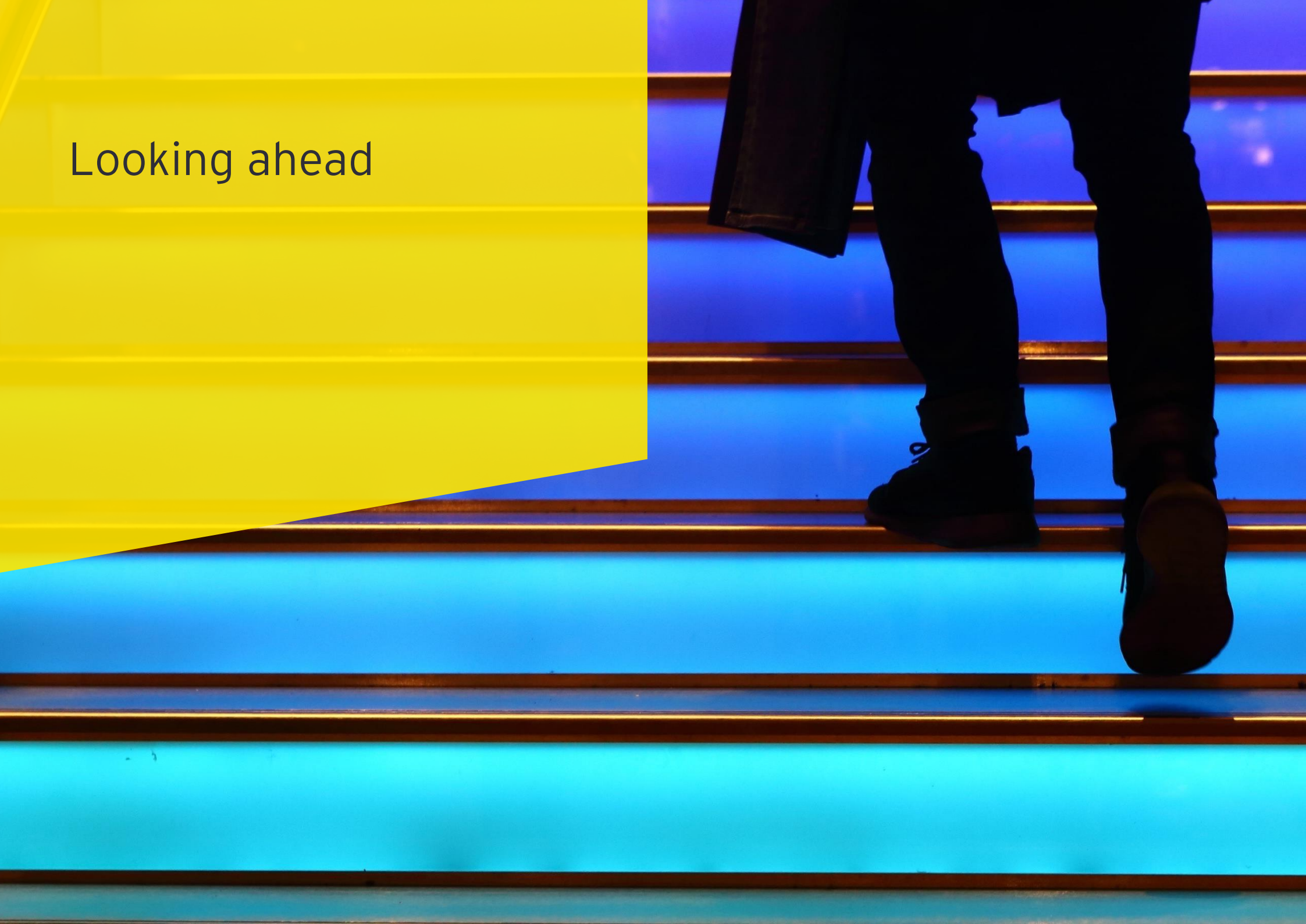
Looking ahead



What next?

Human Signals is taking a break after a busy season.

If you want to share your opinion, access future editions or find out more about this research, **please let us know.**

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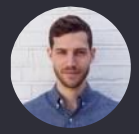

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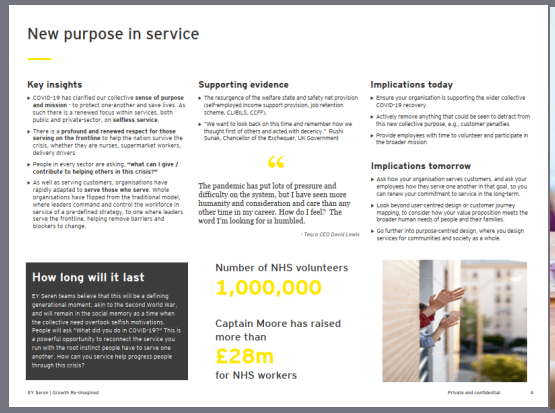

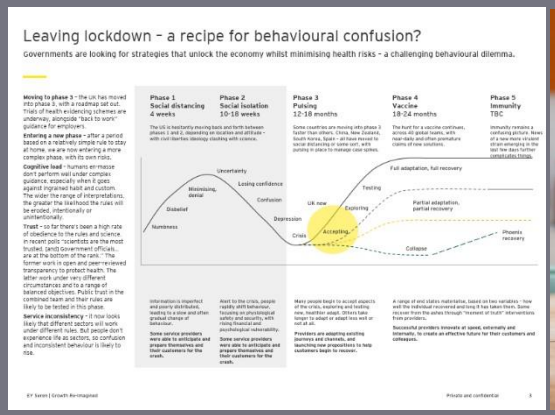

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