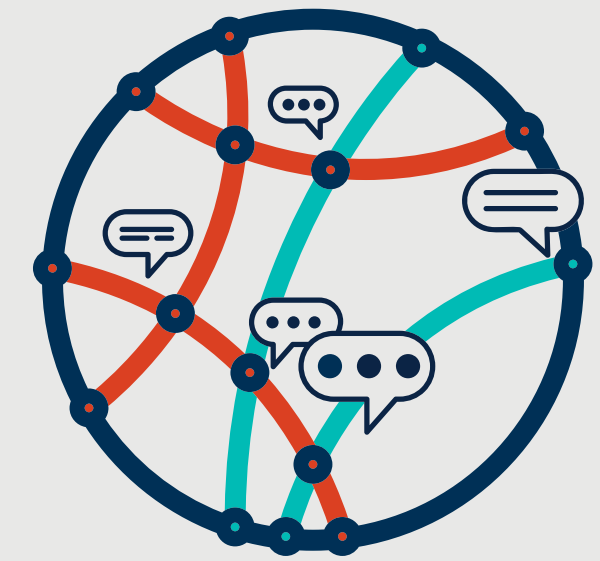


Unpacking



Helping people cope, adapt, and thrive in a COVID-19 world

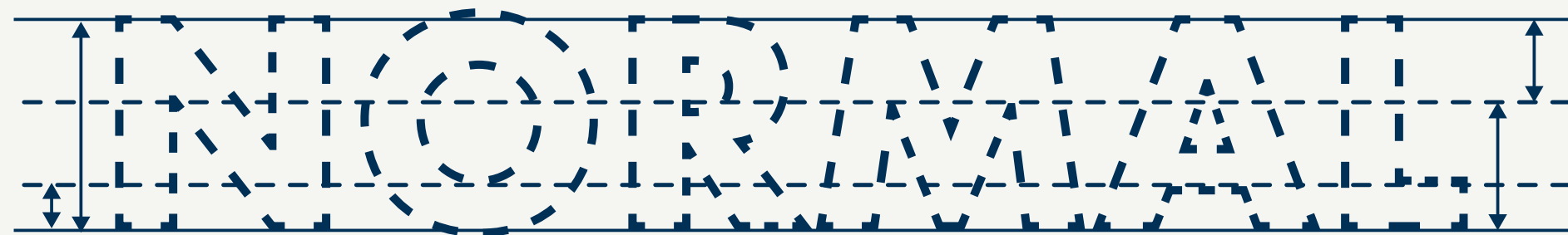


COVID-19
CONFessionALS

AN OPEN STUDY BY CONIFER RESEARCH

"Nothing is normal about the situation we are in now. It's still crisis mode which means we're reacting to what's happening to us and working around obstacles."

— Male, 33, in Bangkok, Thailand



To understand normal, look to the abnormal.

In mid March, 2020, Conifer launched an open study to connect with people and learn how they were adjusting to and coping with the changes brought about by COVID-19. By collecting photos, videos, journal entries, and open discussions, we've created a window into the impact on people around the world.

We unpacked what "normal" means to people, by focusing on the gaps left when normal is upended. **"Normal" is not only about everyday routines and interactions; it is also the emotions that those activities create and reinforce.** Feeling normal is an important driver of how people behave. It provides a foundation with which we plan, make decisions, and understand how to interact with others.

Right now, people are closely evaluating experiences and experimenting with new routines. By listening and being responsive, businesses have an opportunity to learn from this reflective state-of-mind and fulfill people's adjusting needs.



Understanding what enables people to feel normal opens the door to help people cope, adapt, and thrive in a COVID-19 world.

Our understanding of normal has helped us to see that plans to move into a “New Normal” (living alongside COVID-19) that only focuses on people’s safety will have limited success in restoring a feeling of normalcy.

While safety will be paramount for all experiences in the foreseeable future, through this research we were able to push beyond safety concerns to understand the impact of COVID-19. New safety protocols alone cannot fulfill people’s needs to feel normal.

When normal is taken away, people have to change their routines, be hyperaware of their surroundings, and experiment on-the-fly in response to new demands. **Operating in the abnormal is exhausting.**



... ALLOWS PEOPLE TO **JUDGE RISK**

... RELIES ON THE **PREDICTABLE**

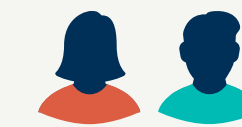
... CALLS FOR A **SUITABLE EFFORT**

... CONTAINS **POSSIBILITIES**

Safety and normal are relative. Normal gives an individual the bearings to judge risks, actions, and decisions accordingly.

The desire to decrease the risk of COVID-19 infection has drastically changed how people interact with others and their environments. Life before COVID-19 wasn't without risk; however, those risks were better understood and their impact could more easily be measured and monitored (e.g., not wearing a seatbelt increases the chance of a fatal car accident).

Because of COVID-19, the scale of change and a lack of agreement over what the changes mean has intensified emotional responses. New levels of risk have forced us to re-evaluate what it means to be in proximity to others (strangers, coworkers, and even family members), in the immediate presence of others, or where others have been.



VOICES FROM OUR STUDY

"**The distancing went okay** except one guy who clearly believed this whole thing is fake news and got into my space. Even if you do think it is, **respect others wishes to follow the guidelines!**"

— Female, 49, in Chicago, IL

"I dared to reach out through Craigslist for a purchase I couldn't pass up (and needed). **Question was — what's my protocol for pick up?...** This situation made me think about **how comfortable will we all be** to immediately bring up **'can you please wear a mask?'** to someone you plan to meet, but don't know. It's definitely a bit awkward.

— Male, 54, in Chicago, IL

"It is nice to have a couple of extra people around. **Once you get past the idea of possibly getting them sick, or them getting you sick...**I hope neither is the case."

— Male, 36, in Columbus, OH

People are struggling to evaluate situations when they can't control risks with their actions alone.

For many, the risks created by COVID-19 are novel and hard to evaluate. People want to feel confident that the service or establishment they choose to do business with is making safety a priority. As people begin to leave their homes and enter public and communal spaces, hygiene and social distancing measures are basic indicators that a business understands the level of risk and is taking on additional responsibility.



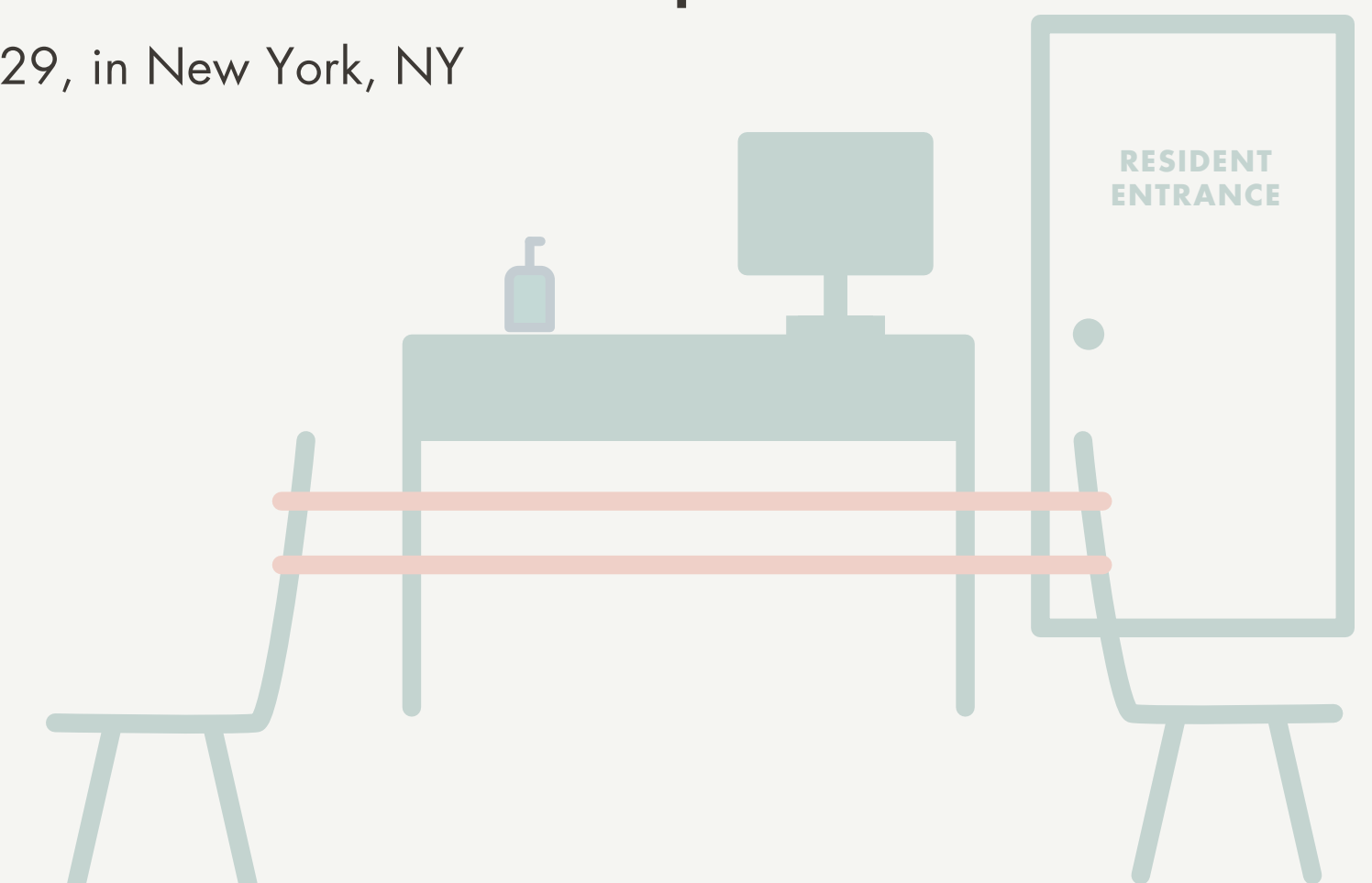
VOICES FROM OUR STUDY

"This is all about **fear vs safety...Fear from all the safety measures and precautions** in my condo building and in the city in general, but **the safety in knowing that other people are trying hard to keep us all safe.**"

— Male, 33, in Bangkok, Thailand

"The lobby is used by ~150 people, with deliveries coming constantly. **The building managers are trying to make sure that everything gets cleaned** repeatedly throughout the day, **but it still seems like the place I am likeliest to be within infection distance to another person.**"

— Female, 29, in New York, NY



People need to be able to judge risk and build trust:

- Reassure customers and employees by communicating what safety precautions or actions have been taken
- Train employees to inform and guide customers through procedures that promote and maintain a safe environment and interactions with other customers
- Help people assess inherent risks in the experience by developing easily scannable safety indicators
- Identify opportunities to mediate trust (e.g., business to customer, business to employee, employee to customer, customer to customers)

When routines become unpredictable, actions require more thoughtful decision-making.

Reliable, known experiences make everyday life less taxing. We are able to manage resources, make better financial choices, and avoid over-stressing our emotional and cognitive loads. Now that COVID-19 has disrupted people's routines, there is a nearly constant need to make and reassess plans that are often only short-term solutions. The situation is fluid, making long-term planning difficult — what is true today might not be tomorrow.



VOICES FROM OUR STUDY

"[Rumors about grocery stores changing their hours] has definitely changed the way I plan...making sure I have enough food in the house... [There is] a lot of uncertainty about whether the restrictions will actually be put in place or not."

— Male, 33, in Bangkok, Thailand

There was a moment where we had to align with what it meant to remote work in collaboration. **This isn't how we normally work.** How do we **make sure that we're comfortable** when collaborating? We're both very intensely engaged, but sometimes doing things opposite of each other, which was hard.

— Female, 29, in New York, NY



Straightforward and honest information helps people make decisions and move forward.

Until situations stabilize, people will seek and rely on new information to make decisions. The right information will help people prepare to face new policies and work toward setting expectations around their changing environments. Information should be clear, simple, short, and easy to digest — even when someone is distracted. Moreover, messaging should demonstrate how organizations are keeping the changes employees and customers are facing in mind.



VOICES FROM OUR STUDY

“Getting **good information helps me** feel more in control of the situation so that I can **plan my day/week/month accordingly.**”

— Female, 43, in New York, NY

“The mixed signals [around PPE] created anxiety, and **an air of tension throughout the entire hospital that even Michael Phelps would have a hard time swimming through.**

Non-COVID patients are being shuffled urgently away from units that were once ‘clean,’ but became ‘dirty.’”

— Female, 26, in Flagstaff, AZ

“This message was direct...**I appreciated that it simply said how their company was dealing with the pandemic, and that's it.** Not fluff, no (apparent) lies to get you to purchase their product.”

— Female, 29, in New York, NY


Experiences need to be predictable:

- Identify touchpoints where predictability is most important and prominently feature your efforts to ensure consistency
- Be transparent and forthcoming with information about changes, especially if changes are experimental or temporary
- Communicate in clear, straightforward, and short messages
- Enable customers to be well-prepared by notifying them of any policy changes and how the experience has changed

NORMAL CALLS FOR A **SUITABLE EFFORT**

Experiences require more effort from people and are redefining their baselines

COVID-19 has added an extra burden onto many experiences, requiring people to invest more effort and attention. Simple errands, such as getting groceries, have become more complicated with greater consequences and added steps to ensure safety. People are more likely to seek alternative experiences if the current ones become too much of a burden.

 "I am about to run to the grocery store, **which is definitely more concerning and more of an ordeal** than in 'before times.'"
— Female, 45, in Palatine, IL

Added Effort from COVID-19

- + When will I be able to go next?
- + Has the store changed their hours?
- + Is this a safe time to go? Will there be a line?
- + Do I need to stock up on items?
- + Have prices increased for high demand items?
- + Should I adjust my budget? What items can I give up?
- + The kids are not in school — is someone home to watch them?
- + Put on my protective gear
- + Look to see if I am a safe distance from other customers and employees
- + Examine surfaces. Are these surfaces clean? Do they look clean?
- + Find a replacement if the item is out of stock
- + Decontaminate items and gear once home to reduce health risks

Baseline Steps

- What to get / when to go
- Grabbing items
- Returning home



VOICES FROM OUR STUDY

"When I enter my apartment, **the current routine is** to put keys down, take off shoes, wash hands, remove mask, wash mask, wash hands."

— Female, 43, in New York, NY

"I spend an incredible amount of time menu planning. **I need days to choose recipes, check inventory, and get the additional ingredients.** By the time the appointed day arrives that I was planning to make the special meal, I rarely want to."

— Female, 47, in Charlotte, NC

"I haven't **reached the point of trying a delivery service for my groceries**, but we did speak about it last night."

— Female, 49, in Chicago, IL

Searching for solutions in a time of instability is exhausting — practicality outweighs perfection.

Responding to a crisis takes a great amount of trial and error. Searching for the right routines requires working through the phases and the emotions of acceptance and frustration that come with it.

For many, it is hard to gauge where to start. What is the best solution or approach? Which actions are just temporary work-arounds and which ones are worth keeping? Untangling these questions requires time, effort, creativity, and the tenacity and resourcefulness to keep trying.



VOICES FROM OUR STUDY

"Hopefully, things are getting closer to the new normal, but that first week back [to school] was a killer! I hope the Zoom classes are adding a little bit of normality for my students, **but some of them are definitely struggling.** My son has been doing pretty well with his online learning — but **I'm worried he isn't actually learning anything!**"

— Female, 45, in Palatine, IL

"**The need to communicate almost constantly** with staff members, board members, colleagues, and community members (let alone family members and friends) **is exhausting...** All of this has required a great deal of time and, while I am grateful to be busy and to have valuable work to do, I am spent."

— Male, 53, in Chicago, IL

"My tween daughter is starting to get pessimistic, which is definitely out of character. She and her friends feel that their only motivation for continuing with all the school work is that they don't want it to build up. **Home equals homework right now, and not home.**"

— Female, 44, in Ho Chi Minh City, Vietnam

COVID-19 is fostering creativity and experimentation, potentially accelerating behavior changes.

Due to forced changes from COVID-19, people are willing to try new ideas and may find themselves being rewarded for their efforts. This positive impact may encourage them to continue these behaviors beyond the pandemic. There is potential and a desire to enhance interactions, environments, and operations for both established experiences, and those that will be part of the “New Normal.” These behavior changes may utilize products and services that already exist but are finally gaining a wider adoption, a new adaptation that is beginning to take root, or a new solution that is yet to be discovered.



VOICES FROM OUR STUDY

“**Our teams are happily surprised** about how prepared we actually were to move to a remote work environment and to do so as successfully as we have. That is already **making us think about how remote working might effect our future** use of physical spaces and our needs for certain amounts of physical space, such as office space.”

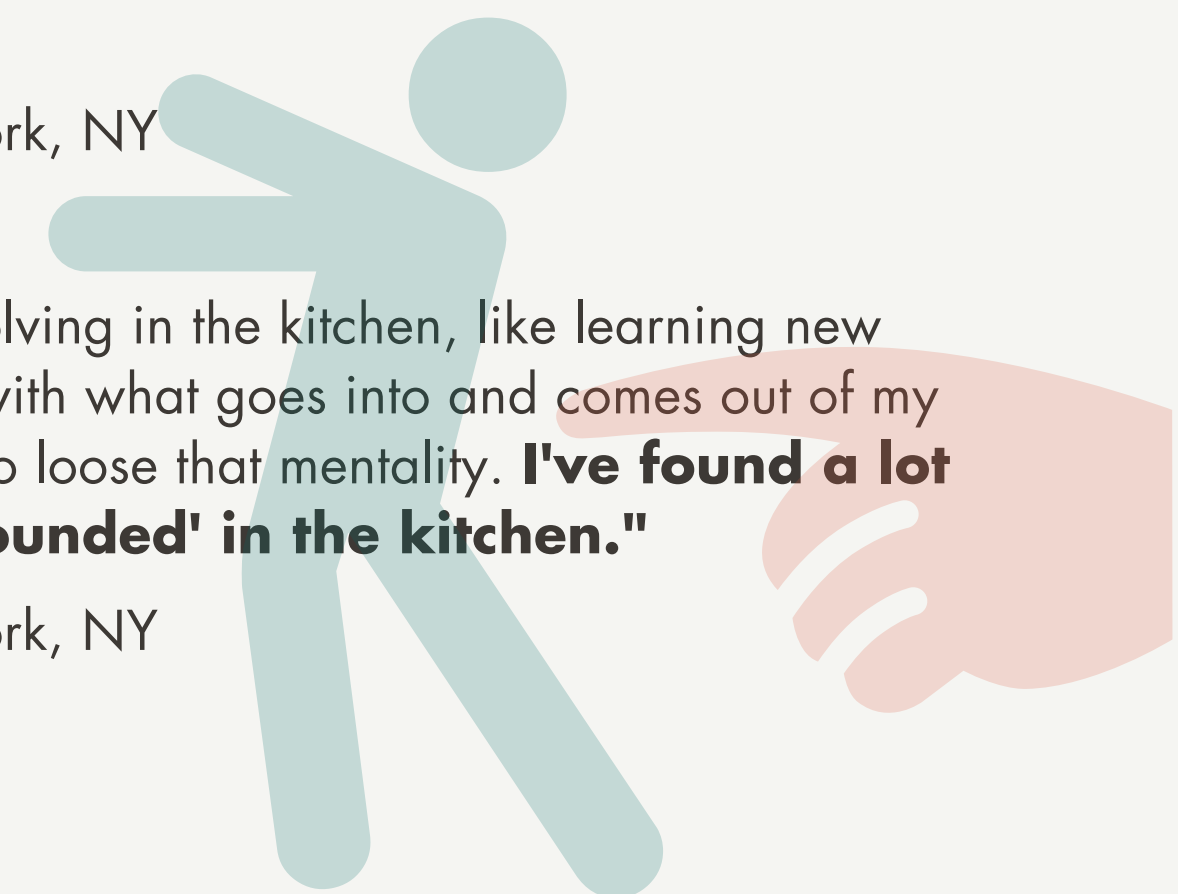
— Male, 53, in Chicago, IL

"I hate going to gyms and I feel generally uncomfortable in them. **The Zoom class may actually be a better solution for me in general**, if I was to continue this after I go back to being able to walk outside.”

— Female, 43, in New York, NY

"I'm eager to continue evolving in the kitchen, like learning new skills and staying in tune with what goes into and comes out of my refrigerator. I don't want to lose that mentality. **I've found a lot of joy and feeling 'grounded' in the kitchen.**"

— Female, 29, in New York, NY



Experiences call for a suitable effort:

- Identify what influences the level of effort that customers and employees are willing to put into your experience
- Offset extra steps in the experience caused by COVID-19 by identifying opportunities to take on the responsibility of specific tasks in a customer journey (e.g., cleaning off a cart before a customer uses it)
- Evaluate any adjustments made to your experience due to COVID-19 and identify touchpoints that have a positive benefit worth keeping. (e.g., telemedicine — areas where technology can enhance operational changes)
- Reduce the emotional burden on customers and employees by finding ways to add delight to their experiences
- Look to first-time customers for a fresh perspective on the value you deliver and determine how to attract more new and loyal customers

Normal sets the stage for spontaneous and serendipitous moments.

Normal is the free-flow of life with the choice to stick to predictable routines; the freedom to change plans with a moment's notice. These spontaneous and serendipitous moments can be small — impulsively trying a new snack, stopping at a coffee shop because it looked cozy. These moments can also be big — a spur-of-the-moment weekend trip. The added risks due to COVID-19 can throw any such decisions into disarray.

People will need to understand the implications of their new baseline normal in order to comfortably and safely make those decisions again.



VOICES FROM OUR STUDY

"I went for a nice walk to CVS to buy toothpaste and stopped by the local deli. **They put up a to-go window almost immediately after restaurants were closed** and people have been lining up to get a breakfast sandwich. **I forgot the simple pleasure of walking to a cafe and ordering an iced coffee and it being really good.**"

— Female, 25, in Chicago, IL

"Walking and wandering are activities I miss the most. Pre-COVID, aimlessly wandering around grocery stores was my way of de-stressing, and I would be able to hit >10,000 steps each day."

—Female, 26, in Chicago, IL



The “New Normal” will not happen overnight and it will not be “one-size-fits-all.”

COVID-19 has amplified the differences between people. A person’s health, local guidelines, job, economic situation, access to personal and public resources, and level of risk aversion will affect the choices available to them.

Some may feel they have no choice but to self-impose restrictions. For others, the choice has been made for them (e.g., stating that a mask must be worn when entering a public place). And for many, the use of technology has become the only choice for maintaining social, professional, and educational engagements. Iterative and multi-staged planning for the future that accommodates the needs and comfort-level of everyone will lead to a more successful “reopening.”



VOICES FROM OUR STUDY

“My children will **be required** to wear a mask the entire day, **no longer use** their lockers, school lunches will be only pre-made boxes, and will **need to have their temperatures taken 3 times a day** in addition to the masks and hand washing.”

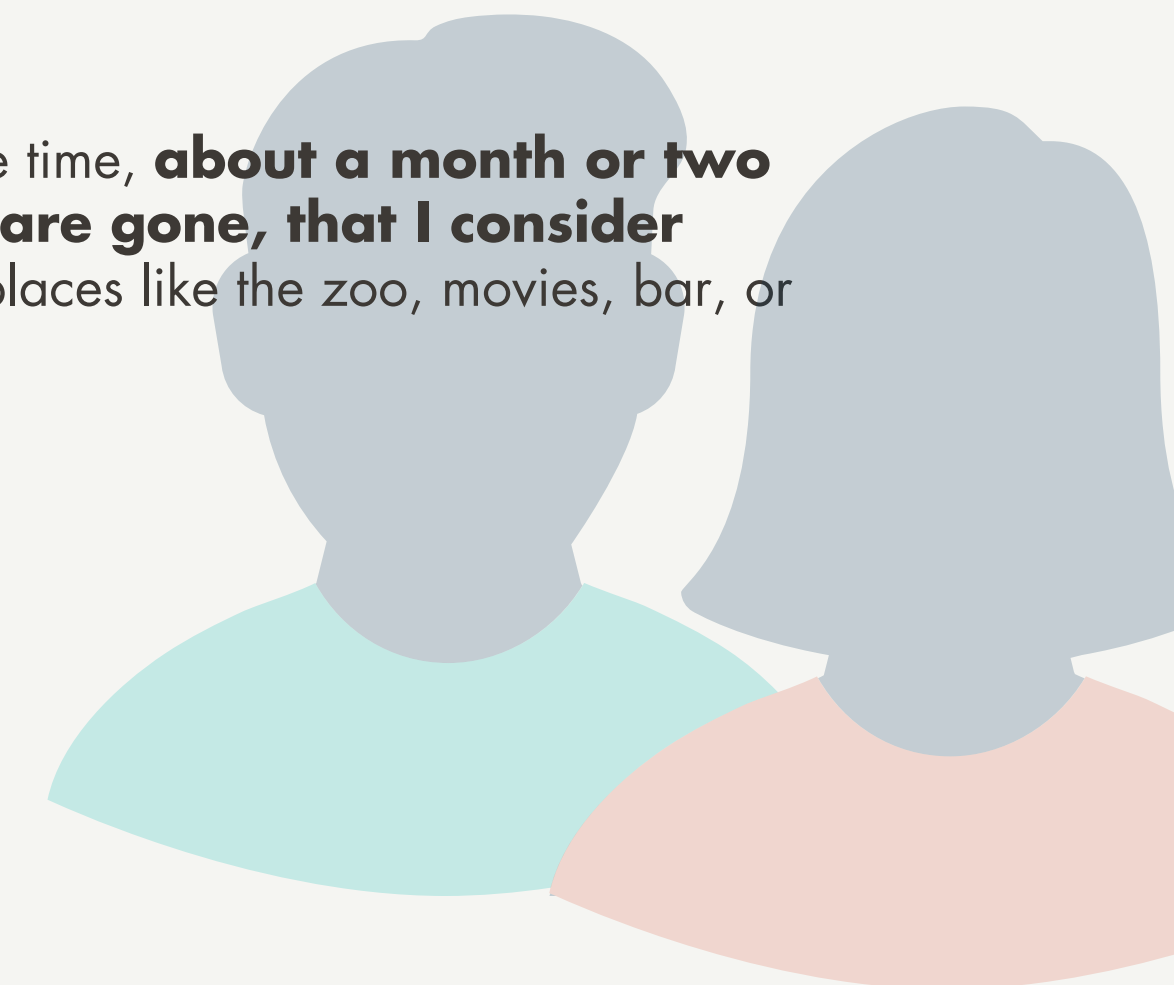
— Female, 44, in Ho Chi Minh City, Vietnam

“My husband and I are both high-risk — I have asthma my husband is diabetic. So **we actually self-quarantined**, maybe about 5 days **before** our town became the first in Illinois to issue a shelter in place order.”

— Female, 43, in Oak Park, IL

“I think it will be a little bit more time, **about a month or two after after the restrictions are gone, that I consider normal** mass gathering style places like the zoo, movies, bar, or sporting event.”

— Male, 36, in Columbus, OH



Experiences need to contain possibilities:

- Understand the role of spontaneity in your experience and create opportunities (in existing channels or by identifying new ones) for discovery and exploration under the constraints of COVID-19
- Build service offerings that meet and address varying customer needs based on their respective limitations
- Remove barriers that limit the choice or the ability to complete a task or experience as desired

Looking at experiences in a COVID-19 World

To understand how people interact with products and services, Conifer created the 5E model as a starting framework for breaking down the full user experience. **Using the 5E model as a guide, how do these principles of “normal” relate to your experience?**

How can your experience help people cope, adapt, and thrive in a COVID-19 world?

Entice

Enticements are the reasons that people choose to participate in an experience. They foster anticipation and set expectations.

Enter

Entrances mark a beginning. They provide guidance and orientation to the experience.

Engage

Engagements are composed of a set of activities rooted in environments and interactions.

Exit

Exits are the transition out of the immediate environment or interaction.

Extend

Extensions maintain a connection with an experience after it is complete. The best extensions are memories and impressions that live on beyond the immediate experience.

How do these principles relate to your business’s experience?

NORMAL ALLOWS PEOPLE TO JUDGE RISK

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- Look to first-time customers for a fresh perspective on the value you deliver and determine how to attract more new and loyal customers

NORMAL CONTAINS POSSIBILITIES

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PERSPECTIVE SHIFTING INSIGHTS