

Human Signals

Exploring emerging human behaviour and service purpose during C19

Tracking today's challenges to find tomorrow's solutions

Edition 2

May 2020

A rolling research project

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

We're running 2-week sprints of mixed-method research to understand how the global pandemic is **changing how we live and how we work**.

Our 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 we are running:

- **Desk research** across over 200 sources
- **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 C-19 is transforming the role of design and delivery
- **Quantitative surveys** to validate and scale our insight

We're taking an iterative approach to this research, working in **2-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.



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New insights in this issue

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The anatomy of an insight

Each fortnight 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.



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Leaving lockdown – a recipe for behavioural confusion?

Governments are looking for strategies that unlock the economy whilst minimising health risks – a challenging behavioural dilemma.

Moving to phase 3 – the UK has moved into phase 3, with a roadmap set out. Trials of health evidencing schemes are underway, alongside ‘back to work’ guidance for employers.

New phase of experiment – after a period based on a relatively simple rule - stay at home – we’re now entering a more complex phase, with its own risks.

Cognitive load – humans en masse don’t perform well under complex guidance, especially when it goes against ingrained habit and custom. The wider the range of interpretations, the greater the likelihood the rules will be eroded – intentionally or unintentionally.

Trust – so far there’s been a high rate of obedience to the rules and science. In recent polls “scientists are the most trusted, [and] Government officials... are at the bottom of the rank.” The former work in open and peer-reviewed transparency to protect health. The latter work under very different circumstances and to a range of balanced objectives. Public trust in the combined team and their rules are likely to be tested in this phase.

Service inconsistency – it now looks likely that different sectors will work under different rules. But people don’t experience life as sectors, so confusion and inconsistent behaviour is likely to rise.

Phase 1 Social distancing 4 weeks

The US is hesitantly moving back and forth between phases 1 and 2, depending on location and attitude – with civil liberties ideology clashing with science

Phase 2 Social isolation 10-18 weeks

The US is hesitantly moving back and forth between phases 1 and 2, depending on location and attitude – with civil liberties ideology clashing with science

Phase 3 Pulsing 12-18 months

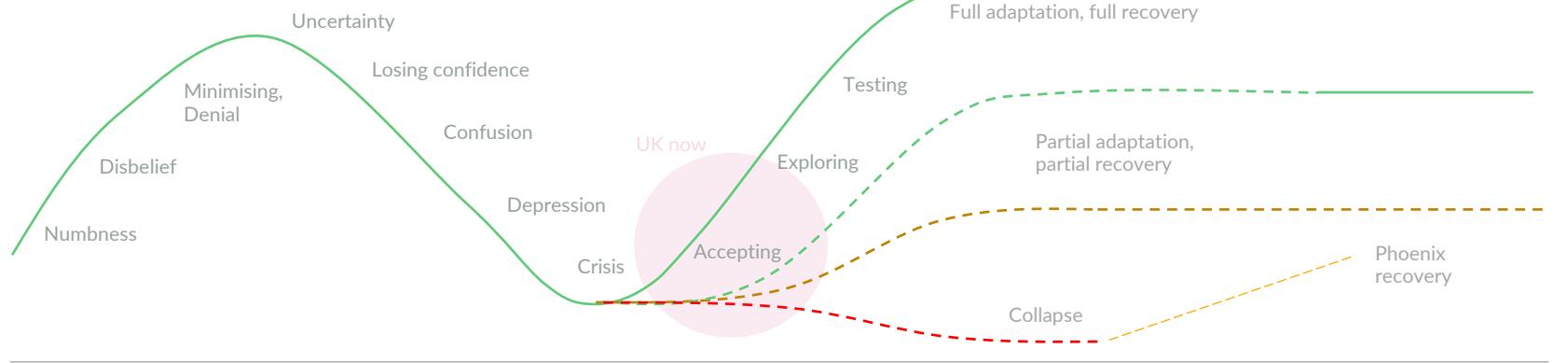
Some countries are moving into phase 3 faster than others. China, New Zealand, South Korea, Spain – all have moved to social distancing or some sort, with pulsing in place to manage case spikes.

Phase 4 Vaccine 18-24 months

The hunt for a vaccine continues, across 40 global teams, with near-daily and often premature claims of new solutions

Phase 5 Immunity TBC

Immunity remains a confusing picture. News of a new more virulent strain emerging in the last few days further complicates things



Information is imperfect and poorly distributed, leading to a slow and often gradual change of behaviour

Some service providers were able to anticipate and prepare themselves and their customers for the crash.

Alert to the crisis, people rapidly shift behaviour, focusing on physiological safety and security, with rising financial and psychological vulnerability

Successful providers have focused on short term service resilience and continuity.

Many people begin to accept aspects of the crisis, exploring and testing new, healthier adapt. Others take longer to adapt or adapt less well or not at all

Providers are adapting existing journeys and channels, and launching new propositions to help customers begin to recover themselves

A range of end states materialise, based on two variables – how well the individual recovered and long it has taken them. Some recover from the ashes through ‘moment of truth’ interventions from providers

Successful providers innovate at speed, externally and internally, to create an effective future for their customers and colleagues

Edition 2 Human Signals

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What our latest research has uncovered

Do I trust it?

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 2 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. BAME, who are affected disproportionately by C19.

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.



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.”

“Employer communications is the most credible source of information about the coronavirus. 63% said that they would believe information from that channel... versus 58 percent for a government website and 51 percent for traditional media.”

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

“Airlines are talking about spare seats in between passengers. But you still don’t know what germs are around.” – Diary participant, Male 65

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 C19, 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

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

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 C19 is likely to last in social memory, return to your vision and mission, and ensure that trust plays a key role

••• A new era of leadership

The mid 1930s sparked **the era of the engineer**. Veblen, Scott, and Rautenstrauch "likened society to a machine, calling for government as 'social engineering'. The policymaker's role was to tinker and probe, to keep things working despite stresses, strains, and shocks."

The 1970s brought the **era of the scientist**. "Neoliberals developed their ideas on the model of physics." In this mode, countries, markets and firms could be run according to a 'Washington Consensus' of standardised policies. Nations and markets became "convenient laboratories" for change.

C19 is accelerating us into a new era: that of **the doctor**. The doctor sees "the newly globalized and financialized economy" like "an organism struck by pathogens" where old rule books don't apply, and where subjectivity and objectivity sit on an equal footing. The opportunity to shift strategy towards purpose, sustainability, and inclusiveness is available in ways that it wasn't before.

As leaders around the world focus on the longer term recovery ahead, there is an emerging realisation that any return to normal will require them to transform their businesses, services and platforms. There is also a desire to not only return to a 'new normal' but address larger, regional and global challenges along the way such as climate change, poverty, and access to healthcare. **Care is the new watchword** – so this shift to a doctor mindset of leadership seems like an opportunity that shouldn't be missed.

Leading in this new era requires a range of **new attitudes and traits**: empathy, purpose, acting on behalf of all stakeholders your organisation represents and impacts, the ability to seek a range of inputs yet be decisive, being other-directed, provide strong vision-setting, and balancing risks. If in doubt do what the doctor does – get closer to the people you care for.

How long will it last

We're not doctors, but we can relate to a lot of this. We've long recognised the need to combine thick messy data about humans, with the cold hard data from machines. To bring different experts together in experiments, and use customer contact to trigger empathy. This is our way through wicked problems, so it feels like an acceleration of a long-term shift.



Supporting evidence

"We believe that leadership is strengthened by continually referring to the big picture as an anchor for meaning, resisting the temptation to compartmentalize or to consider human life in statistics alone. Leadership in an uncertain, fast-moving crisis means making oneself available to feel what it is like to be in another's shoes – to lead with empathy."

– Harvard Business Review

"But one thing is clear: traditional "alpha" leadership is not proving very helpful at all in this crisis. Those who attempt to project puffed-up authority and come across as falsely knowledgeable in a situation where there is no certainty are clearly not the people we can trust right now."

– The Financial Times

Please be strong, be kind, and unite against Covid-19.

Jacinda Ardern - New Zealand Prime Minister

Implications today

- If you're in a leadership position, look as much to your heart as to your head, but don't get woolly – urgent decisions are critically needed
- Find ways to have contact with real customers and colleagues at the frontline, to balance the 'filter bubble' risk of acting only off second-hand 'cold' dashboard data about people
- Keep your communications clear and transparent
- Don't fear mistakes and missteps. Avoid the instinct to double down to appear confident

Human insights

"I tried to create the feeling in people that they are empowered to treat the situation as they wanted to and get everything in place in their own way. 'you can control your own narrative'"

- Senior Manager, Professional Services Business

"I've gotten to know my line manager as more of a friend."

- Diary study participant, Female, 30s

"I'm being honest with my team about the down days I experience, this makes it easier for them to share their true feelings with me and the team. A feeling where a team member can say 'I'm overwhelmed' and they can take the day for their head"

- Director, FTSE100

Implications tomorrow

- Create cognitively diverse teams, especially at leadership levels, as they're proven to outperform cognitively normative teams
- Coach senior leaders in conscious and vulnerable leadership qualities, so they're open to diverse points of view and mixed sources of information
- Encourage leaders to bring their own struggles and experiences to bear, to create empathy and understanding, and avoid the often demanding and alienating need to be 'always alpha'

••• We've all lost something

Everyone's lost something to C19 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. Many households are **experiencing a significant drop in income** as a result of the economic and health policy responses to C19.

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.

How long will it last

C19 is not the great leveller as first believed. You're much more likely to die from it if you're poor. Nevertheless, there's a strong cultural sense that we've all 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 creation of BBC Bitesize is a great example of helping both children and their parents to build their capacity to homeschool.

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.

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

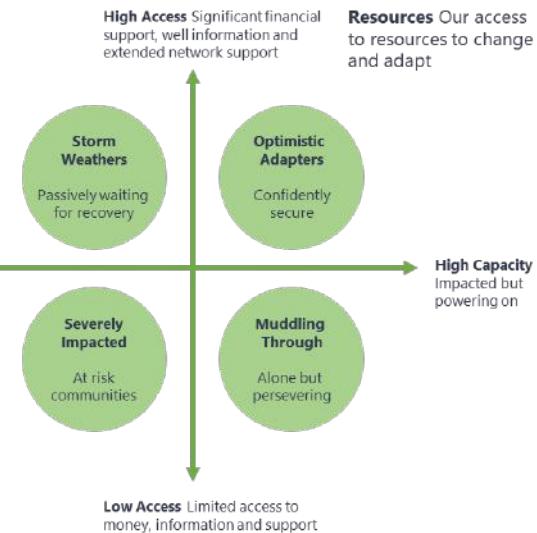
Supporting evidence

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

- Emily Maitlis, BBC News

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



Loss Mindsets We 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 optimised service experiences to the specific need states of customers and colleagues, 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 we can't improve their 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

••• Make do and mend

Although we've all lost something in this crisis, there's also emerging evidence we're trying to **create something new**.

Consumption of screen content has risen, but the combination of binge-watching colleagues then binge-watching Netflix isn't much fun - there is a need to achieve a **screen-life balance**.

This desire to create something new is not about chest-thumping declarations of emerging from isolation with a suite of new skills, a new business idea and a brand new body, it's a gentler notion.

Given the scarcity of goods, resources, stimulus and cash, people are having to **make do and mend** what they have.

This **shift from consumption to production** is helping people find or rediscover the forgotten pleasure of the creative process.

So while for some this may be developing a new skill, for many it is the smaller acts, having a go at scratch cooking, creating a movie night or taking up drawing again, that are providing both relief and support, and bringing families closer together.

John Lewis is reporting a rise in sales of sewing machines, craft kits and wool as people become more creative with their time

Online DIY product sales were up 42% in March

How long will it last

How much of this is born out of necessity versus choice is yet to be seen. For some financial prudence will mean this becomes a necessary way of life for some time – a means of exerting control over their lives and expenditure. For others, the benefits to wellbeing, health, and family togetherness may form new rituals and values. As we begin to emerge from lockdown, our newfound – and sustainable – skills will compete with the consumer convenience of the ready-made, pick-up-and-go culture.

Supporting evidence

"People are continuing to look for new ways to pass their time. Whether it's preparing their outdoors space for the summer, exploring pet adoptions, spending time with friends and family online, or looking to DIY their self-care, beauty, baking, and home decor, people are adapting and being creative with how they spend their time."

- Think with Google

"All bread bakers feel united. People are baking bread in many different languages"

- Nigela Lawson

"The garden is a sanctuary. No one wants to be isolated just in their house. It's good for the mind ... it gives you a sense of well-being."

- Alan Roper, The Blue Diamond Group

Human insights

"My son is excited as I have created a little movie night and made little snack boxes, we would've never done this kind of thing before. Made cookies again – it went wrong. I'm not good at baking, but lockdown has made me try"

- Diary study participant, female, 31

"The one thing I reflected on today when both me and my son were lying on the grass in our garden, was the fact that this has given not just us, but everyone a great opportunity to re-live the "old school" days where parents had a lot more time to play with their children, spend time away from the TV and computers."

- Diary study participant, male, 31



Implications today

- People are evaluating what they consider to be essential spending, especially as the longer term financial implications bite – the experience of 'making do' is one way people are taking control and managing their financial uncertainty
- Engage consumers in their desire to 'create' and provide them with access to the tools, resources, and insights to make do with less, and create experiences in isolation that generate value

Implications tomorrow

- New models of consumption will begin to emerge as we look at the long term benefits of what lock down means in terms of climate change and consumer waste. Brands that can activate the desire in customers and colleagues to make a difference will build on the loyalty they are creating through purpose with customers
- A shift to purpose-centred design will support brands in creating authentic value with customers and colleagues in the post-lockdown consumer experience

Sharing space and burdens

Coronavirus is changing how people interact and navigate spaces (both public and private). **We are moving from a 'high-touch' to a 'low-touch' world.**

Urban infrastructure is ill-suited to physical distancing and is being **hastily changed to signal desired behaviours**.

Employers will roll out **physical distancing measures in workplaces**. This is already happening in China.

Citizens' new default position will be to avoid crowds and public transport. **Bicycle use will increase in urban areas.**

People are sharing the burden of lockdown in family units and local communities. In some cases family members in the same local community are using social media to stay connected as they are forced to self-isolate.

In the short term, impacted workers have relied on bank repayment holidays and the government furlough scheme to sustain them. However, when these crutches are withdrawn, individuals will be forced to **turn to their family and other networks to bridge income gaps**.

**As of 1st May
4M workers
have been
furloughed on
80% of pay and
more than 1.2M
have paused
their mortgage
repayments for
three months**

How long will it last

Changes to public and private space will persist long after the immediate peak of infections subsides. Retail and leisure environments will be forced to adapt to facilitate low-touch, limited-proximity operating modes until a vaccine is widely available.

The phasing out of the government furlough scheme from July will mark the beginning of a new phase of vulnerability for workers as they turn to family to share burdens.

Supporting evidence

"The Mayor of London, Sadiq Khan, and TfL have today unveiled their 'London Streetspace' programme which will rapidly transform London's streets to accommodate a possible ten-fold increase in cycling and five-fold increase in walking when lockdown restrictions are eased. ... TfL will rapidly repurpose London's streets to serve this unprecedented demand for walking and cycling in a major new strategic shift."

- Press release, 6th May 2020

"A crucial factor for the future direction of the property market is the willingness of the Bank of Mum and Dad to keep on lending or gifting deposits"

- Clare Barret, Personal Finance Editor, FT

Human insights

"Now I think I'll be anxious and more cautious about getting on packed tubes"

- Diary study participant, female, 31

"I think, one factor I have found challenging during this lockdown is that this is now the 'new norm'. The whole queuing up for ages to get into a shop and then not being able to go with my wife to several shops, this has made shopping a lot more difficult, but I completely understand as to why it needs to be done."

- Diary study participant, male, 31



Implications today

- Service providers should facilitate the shift to 'low-touch'. They must consider how to encourage healthy behaviours to welcome customers back in a safe environment
- Employers must introduce short-term transformations to office configuration, including contactless doors, lifts, room dividers and much stricter cleaning regimes
- Employers will need to stagger the employee return to workplace. Guidelines for employees need to be clear with focused, hyper-care engagement
- Customer experiences will need to manage new need states, anxieties and changing behaviours for a return to the high street and close proximity services

Implications tomorrow

- Urban infrastructure will be redesigned to better regulate citizens' flow around cities and reduce overcrowding and 'choke points'
- Employers should consider scaling down office space out of economic necessity, re-imagine the use and need of physical space for safe working and customer service and accommodate increased virtual working routines for most workers from home
- Service providers must plan for a significant decrease in consumer activity and inability of borrowers to sustain repayments
- Services will need to further digitise to ensure they are resilient, can accommodate pre-vaccine consumer behaviour and returns to lockdown when outbreaks emerge

Generation Crisis

A whole generation is **growing up that only know crisis**: with the 2008 financial crisis, Covid 19, and Brexit in the foreground, and the climate crisis ever-present in the background

The typical psychological responses to crisis are uncertainty, fear and hopelessness, whilst at the same time people try to live an emotionally positive life. This can lead to **cognitive dissonance** and **bewilderment** – as indicated by the research:

- Longing for human connection **vs** valuing the solitude
- Guilty about screen time **vs** screens providing a lifeline
- Living for now **vs** feeling helpless about the future
- Enjoying a life pause **vs** tragedy of trauma elsewhere
- Enjoying family time **vs** madness of forced intimacy
- Opportunity to introspect **vs** feeling sick of myself
- Wanting to grasp the opportunity **vs** feeling exhausted
- Rediscovering cooking **vs** bored cooking every meal
- Working from home is good **vs** binge watching colleagues is bad
- Optimism for humanity coming together **vs** pessimism of long-term outlook

Millennials, born between 1981 and 2008 and now the largest part of the workforce, are maturing into a world of **continual personal and emotional turbulence**.

How long will it last

This is a generation that has only ever known crisis and the persistent need to adapt for the short term. Whether it leads to post traumatic stress or growth depends on individual capacity for change. We expect an increase in security-seeking and also radical new thinking.

Fifth of millennials who were saving for first home now using cash to cope day-to- day



Supporting evidence

"More than a third (35%) of 26- to 40-year-olds are preparing to dip into savings and 22% are borrowing money from a friend or family member to get by... Eight in 10 (78%) millennials say they are currently concerned about their ability to pay bills and loans."

- Yahoo Finance

"They have smaller savings accounts than prior generations. They have less money invested. They own fewer houses to refinance or rent out or sell. They make less money, and are less likely to have benefits like paid sick leave... Compounding their troubles, Millennials are, for now, disproportionate holders of the kind of positions disappearing the fastest."

- The Atlantic

“ As we're trying to hack the system and figure it out, we just got hit again... It makes you just want to lay down and just stay there.

- Vox magazine interviewee **”**

Implications today

- This cohort likely makes up a large part of your workforce, so make time to empathise with the conflicting emotions people are feeling
- Adapt the service propositions you offer to better serve the need for stability and security-seeking. Create offers that combine a pathway to the future combined with flexibility along the way

Implications tomorrow

- Actively seek out the voice of this cohort in decision-making, whether from employees inside your organisation, or from customers outside.
- Provide explicit permission to this group that they can experiment through change. Empower them to explore radical thinking, within a structured approach that manages risk

Human insights

"I woke up so early today had the worst night's sleep and the worst dreams. I realise now I think it was because I was watching the news before bed as this happened last week as well as all the dreams in a weird way were about the coronavirus. I was so anxious."

- Diary study participant, female, 32

"Struggled today because work was slow, and I didn't have much planned besides that. I live alone so often feel lonely during lockdown and miss human interaction with family and friends."

- Diary study participant, female, 31

Virtualising customs and rituals

Customs and rituals are integral to being human. There is an uncanny sense of incompleteness when one can't hug a loved one, head out to meet friends and family for lunch, or shake hands with a client at the start of a meeting.

Equally, physical playground rituals play a real role in childhood education. **Many families struggle with the responsibility of home schooling and keeping children engaged.**

Our leisure time is marked by rituals of collective meals, weekend trips to shopping malls and high streets for lunch and dinner, window shopping, sporting events, cultural events, and so much more.

And as we approach the summer months, travel destinations, culture events, and sports are **all virtualising a return to a mediated shared experience.**

We are more social, in many ways, than ever before, and **social distancing is really more about physical distancing** and our willingness to experience services and share moments together safely in close physical proximity.

90%

of the world's population now lives in countries with travel restrictions

An estimated **25M** aviation jobs and **100M** travel and tourism jobs are at risk

How long will it last

It's about physical distancing, not social distancing. Service providers need to create new ways to engage customers in physical proximity and connect families and friends through social and commercial rituals that can be enhanced and supported by digital and virtual experiences. And as new habits and rituals emerge, with a focus on sustainability and social purpose, brands have an opportunity to shape new services and value propositions

Supporting evidence

Chinese authorities are working hard to encourage citizens to stop the tradition of shared plates and potluck meals

Currys have launched a new live video shopping service to allow people to browse stores with help from professionals.

Some UK bank branches are using video conferencing to maintain contact with their local customers

Many museums, culture sites, and travel destinations have launched virtual tours you can access from home and explore at your leisure

"We're not going to swing the doors open and go back to what was happening before. I don't think that 'where shall we go in Europe for the weekend?' approach is going to come back in the same casual manner."

- Tony Wheeler, Lonely Planet

Human insights

"Morning homeschooling is more structured than the afternoon"

- Diary study participant, female, 31

"We are not socialising in person but are going onto Zoom and various WhatsApp groups but even this is getting boring now – except with my children and grandchildren. Generally, really fed up that I can't do what I want."

- Diary study participant, male, 65



Implications today

- Adapt your service so that old rituals and customs can be maintained
- Think about the physical touchpoints not only in your service experience, but the journey to your service and journey home afterward. What are the concerns your customers and colleagues will have? How will you address them? How will you virtualise and deliver your service experience to the home?
- Use your research, insights and analytics to gain a deeper understanding of your customers' needs and shape virtual experiences that can build a stronger emotional connection

Implications tomorrow

- Find ways to create new customs and rituals
- Virtualise service to create increased social proximity whilst maintain physical distancing. Allow colleagues to connect with customers and increase the personal nature of the services you provide, powered by your digital capabilities
- Tap into your customers' new found sense of purpose and longing for a return of social experiences to drive better engagement and create connections that will last a lifetime

●●● Escape from home

The end of the lockdown honeymoon has been palpable: the flood of memes have reduced, the long-term fatigue of isolation is kicking in, and though some may not yet feel ready to 'return to work', many more are ready to escape the home.

Governments are **easing lockdown restrictions**. Complex social distancing rules and personal health concerns will make the return to physical proximity a **complex challenge for those returning to work, their high street, and their school**. We can expect a return to some things, but normal is unlikely to be one of them.

Each individual will balance competing and inter-related personal, family health and financial wellbeing considerations when assessing their level of comfort with a return to any physical proximity.

Many have found new ways to live and work, which will be either **cast away or reconfigured** in a new round of experiments.

For customers dealing with complex issues like bereavement, illness, and job loss, these will continue and they're likely to demand new **digital expectations developed during lockdown to be met**.

How long will it last

The return to work will be an ongoing effort as markets re-open and people escape their homes to physically re-engage with services, family and colleagues. Responding to colleagues and customers with purpose, transparency and empathy will be essential. Our day one response will adapt over time. Customer and colleague sentiment measurement will help you navigate changing behaviours and expectations.

Footfall in a Wuhan shopping district dropped from 60k a day to
10k post lockdown



Supporting evidence

A recent poll by the Economist found that over a third of Americans think it will be "several months" before it will be safe to reopen businesses as normal—which suggests that if businesses do re-open some customers, at least, may stay away

Our research participants had conflicting perspectives on the future, desiring an escape from home but also balancing personal and family health concerns and conflicting messages across the global media and government landscape

Human insights

"I'm less concerned about getting back to work but more worried about the prospect of getting there – will I really want to get on the Tube, step into an elevator or even eat lunch out?"

-Design Leader, FTSE100

"Finding it tough being away from loved ones. Feeling sad that I can't physically see them."

- Diary study participant, female, 31

"Like lots of Nans, I'm missing my grand-daughters. I just want to hug them and smell them. I want to kiss their sticky faces."

- Diary study participant, female, 56

As people come out of this crisis and start coming back to work, the first thing that I would do is have a discussion about what everyone learned from the experiments they ran. Some of those experiments were by force, others were by choice, but we've all had to test out different routines and the way we work.

- Adam Grant, Wharton School Professor and Author of *Give and Take*

Implications today

- Set up clear principles about the way you'll manage the process
- Set up and track how customers and colleagues are experiencing the shift, so you can quickly inform decisions. Bring in hard and soft / quantitative and qualitative forms of data
- Pay overly close attention to feedback and measures, and communicate regularly, at the same crisis levels, on any adjustments to protocol

Implications tomorrow

- Set up a return to work central function, to explore what elements of this experiment should remain and what should end
- Be transparent with your behavioural insights and data, collating cross-sector best practice, and government guidance on staying healthy and well in close proximity
- Even though we've progressed to phase 3, make plans for intermittent returns to phase 2, and also for how you will progress based on phase 4 and 5 scenarios

Working with signals

...

How to apply these insights in your organisation

Working with #humansignals

Using the Concept-Generation Matrix so you can action these Human Signals in your organisation

About this method

The next couple of pages walks you through a simple, hands-on method for generating ideas from these Human Signals, or any insights you may have access to or be generating, to identify opportunities and generate ideas relevant to your customers, organisation and context.

When to use:

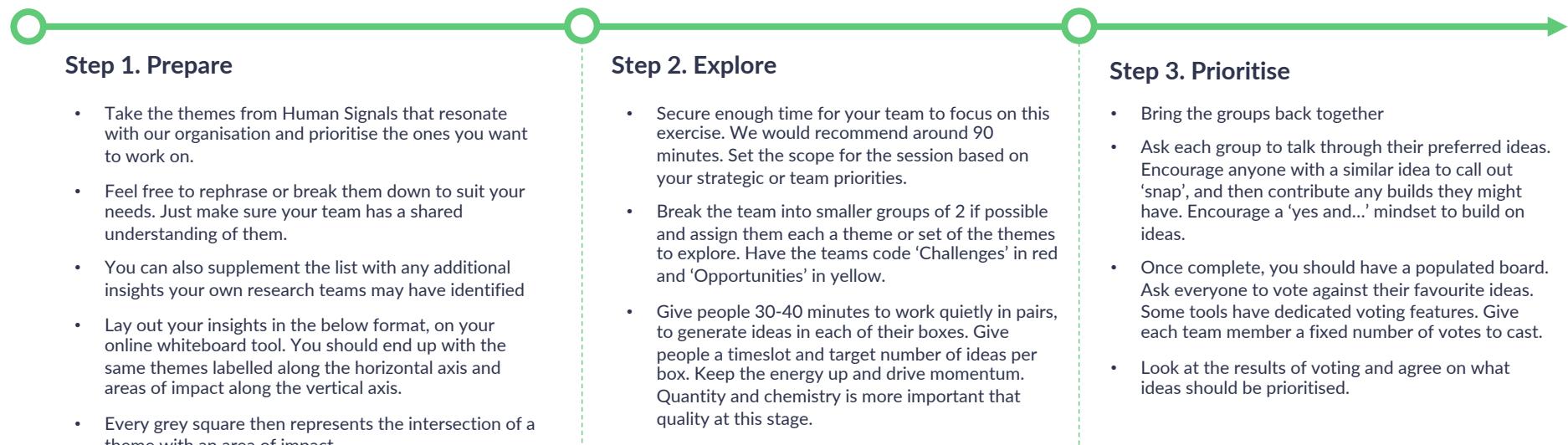
Once you've read the themes and are thinking: how can I apply these to our organisation, in our context?

What you'll need:

- A team of people responsible for your C19 response
- An open-minded and trusted atmosphere
- Reliable video conferencing tool
- Online whiteboarding tool

What to do?
Canvas to use

Step-by-step guide



	Human Signal 1	Human Signal 2	Human Signal 3	...
Customer				...
Colleague				...
Business				...

	Do I trust it	A new era of leadership	Customs and rituals	...
Customer				
Colleague				
Business				

Working with #humansignals

Moving from Human Signals towards a timeline of opportunities (Page 2/2)

Step-by-step guide continued



Step 4. Put your ideas on a timeline

- This step is all about prioritising which ideas need to be worked on most urgently
- Edit the timeline headers below to fit with your organisation's own milestones, or you can use our timelines from earlier in the document (from pulsing through to immunity) – whichever works best
- Take each priority idea from step 3 and allocate them to a phase in the timeline.
- For each idea, challenge the team on how they can deliver value across all three time horizons, so for a Beyond concept, what is the Now activity we can start to consider that may allow us to deliver value earlier, for example.

Now	Next	Beyond
Days and weeks	Weeks and months	Months and years

Step 5. Run your customer and organisation through the concept

- This step is about going deep into your idea from a customer's point of view, and from a few organisational points of view – so you can check it's desirable, feasible and viable.
- Customer:** whether B2B or B2C, your customer will experience your service idea over time. If you have customer personas, introduce them here. Their experience will have a:
 - Before – the trigger and the route are critical, how the need emerges and the customer discovers the service and decides whether to invest time and effort in it to get value out
 - Begin – first impressions of a service matter and are where new behaviours are forged
 - During – how the customer gets value over time from using products and channels
 - After – how the customer assesses the service and shares the experience with others
- Channel:** consider which channels customers are likely to want to use to interact with the service
- Enablers:** which internal organisational teams need to be consulted to make this a reality?
- Success Measures:** what cost, revenue and experience metrics will indicate service success for your idea

	Before	Begin	During	After
Customer				
Channel				
Enablers				
Success measures				

You should now have a range of fresh, C19-relevant, customer-centred and business-oriented concepts to socialise within the business.

Get in touch if you want help with any of this or would like a facilitated session



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Leaders Guide

...

On creating value remotely

When value comes from deep work, how do you help teams avoid the shallows of remote working?

Why you now need to move from a situation of remote busyness, to a focus on remote value creation

At EY Seren we've long recognised the power of 'deep work', which is why our sprints usually have 'dark room Fridays', so people can recharge, collect their thoughts and let creative ideas emerge from the hustle of a busy week.

We explore how organisations can achieve this through remote working.

"We all like to think we have strong teams that can work autonomously but the reality is some people cope with this better than others... It's difficult to strike the balance between being a good 'remote' leader together with not being intrusive or being seen to be checking up for the sake of checking up." – Diary study participant, male, 36

According to the Harvard Business Review, the time employees spend on collaboration has increased by 50% over the past two decades... [but] researchers found it was not uncommon for workers to spend a full 80% of their workdays communicating with colleagues in the form of email (on which workers' spend an average of six hours a day); meetings (which fill up 15% of a company's time, on average); and more recently instant messaging apps (the average Slack user sends an average of 200 messages a day, though 1,000-message power users are "not the exception")." Doist

Remote working can increase shallow work and decrease the deep work where value is created

- Constant interruptions to check in and communicate break flow, which is a critical ingredient of deep work. The fewer the interruptions, the better quality the work.
- The need to be visibly productive becomes the need to be connected. The industrial work model of 'productivity' required workers to be visibly working for the full 8-hour day to justify their employment. In remote knowledge work, this isn't so necessary, or even so desirable. We're all experiencing how counterproductive being 'always on' can be.

Shallow work

- Processing email and chat
 - Attending status update meetings
 - Arranging logistics
 - Organising work lists
-
- Right now people are so 'busy' they're having to do their deep work in the margins, around a tidal wave of shallow work. This is leading to personal problems (stress and overwork) and also business problems - not enough value is being created.

Deep work

- Working on a service improvement or innovation
- Defining and writing a strategy paper
- Preparing a key presentation
- Researching a problem

Right now teams are confused and tired. To maximise the deep work your organisation needs, leaders must actively rethink how to lead teams and help them work remotely

How world-leading value creation businesses do it remotely

"We were happy to find no difference in the effectiveness, performance ratings, or promotions for individuals and teams whose work requires collaboration with colleagues around the world versus Googlers who spend most of their day to day working with colleagues in the same office." Google

"We're betting that in the future, the most successful companies and teams will be the ones who make this shift. It will be the teams that don't require their employees to be always-on, prioritize asynchronous communication to create space for deep work, and allow employees to disconnect and recharge fully." Doist

"Regardless of industry, company size, or leadership styles, a high-trust culture is a defining characteristic of every company that wins a coveted spot on the Fortune 100 Best Companies to Work For list that we have produced each year since 1998." Great Place to Work

Remote working maturity scale

Skeptics	Testers	Adopters	Scalers
Don't see value of or need for remote working. May even suspect deep, value creating work can only be done with physical proximity.	Apply remote working by exception to specific locations and roles. Cultural norm is to work in physical proximity.	Available to everyone, though models of use and engagement vary across the organisation. Cultural confusion about best way to work together to create value.	Remote working shapes how the organisation thinks and works. Value is created systematically, regardless of location or personal preference.

Organisations higher up the scale have a preference for:

1. Asynchronous over synchronous work	Synchronous work requires the whole team to stop what they're doing in order to come together for the majority of activities e.g. updates, decisions, communications. This breaks people's flow and undermines quality of knowledge work. Instead, asynchronous work allows the bulk of these things to happen in parallel to the work, using transparent work tools like kanban boards and by using email and messaging apps. Though beware of email, as it locks information in personal inboxes.
2. Writing over talking	Talking fades, whereas writing persists. When people are remote, and trying to work to their own energy, they won't always be there to hear you speak. So you, or someone else, will end up repeating things. Often details will be confused along the way. Writing things down provides a persistent record, available to all in the team. It usually encourages clearer thinking too.
3. Blocking time over fragmented time	Everyone works differently. Some are night owls, some are introverts. Cognitively diverse teams excel. So it's best to let people work the way that gives them best energy. The key to this is letting people and teams block their time each day and week, and avoid fragmented and crowded days. The key is to let people balance signal and noise – with enough collaboration and solo working to achieve the result.
4. Maximising work not done over busywork	Measure performance based on outputs and results, not on responsiveness or hours worked. You want teams actively managing their scope and deliverables within available time and based on available resources. Encourage them to challenge one another on whether planned work is necessary or a priority. Focus only on what's needed to achieve the outcome.
5. Using the tech over being used by the tech	The speed at which software like Zoom, Microsoft Teams and other remote working tools have been adopted, demonstrates how reliant teams now are on these new technologies. However, no tool is perfect. Teams need to work out how they will combine different tools into their work, alongside good remote ways of working (which we explore on the next page). All technology has downsides – notifications can encourage overwork and burn out, and the 'always on virtual mirror' of VC software, is quickly becoming a hated feature.

Questions leaders should consider to improve remote working maturity

Remote working doesn't work the same way as normal working. Leaders need to make a number of active choices.

What rituals matter to us?

Don't let physical distancing become social distancing. Consider which of your work rituals need to be virtualised. Explore what new ones may be needed.

- Use morning stand ups and stand downs to help people collectively start and end the day
- Encourage people to create their own 5-10 min 'time-to-work' and 'time-to-finish' rituals, to replace the travel between home and work
- Retain serendipity by allowing guests to attend other team meetings, or by running 'non work' sessions during work hours e.g. group lunch
- Encourage audible claps and cheers when recognising success on video conferences (VC)
- Make time for rapport so people can still create bonds
- Give junior members access to senior people, to replace the 'being spotted' opportunities of the office

How should we communicate?

In remote working, not all channels perform the same function, and dialogue and one-way communication work better on different formats.

- Match channel to need. VC for complex dialogue, written messages for relaying facts
- Use the why, what, when, who model of communications, so you don't forget key facts
- Encourage people to share their communication styles, so people don't negatively judge others
- Use photos and gifs to help bring messages to life
- Be present. People need verbal and non verbal feedback during video conferences. Avoid "deadface" aka "I'm here but doing something else"
- Avoid backchannel. It may be innocent, but it unnerves the speaker
- Build in pauses and solo thinking, to encourage input from quieter members

What can and can't people do?

As organisations take on remote working, it can lead to confusion and uncertainty of how to behave. This can often leave people feeling they should just do more. Help people define practical terms, such as:

- You don't have to attend everything, but you must attend these things...
- You can and should block out 'dark room time' for focused work. We suggest...
- You don't have to have your camera on... or explain why it's off
- You can experiment with taking a meeting whilst taking a walk
- Don't be afraid of having family and pets play an unexpected role
- You can turn your notifications off between x and y times, and all channels off out-of-office hours

How should I manage?

Remote working is not a free-for-all. As a leader, you need to make clear what you expect from people, and avoid the bigger risk of misinterpretation that comes with remote working.

- Set clear expectations, through over-detailed written briefs and delegation documents
- Consciously increase the trust you put in teams and avoid micromanagement
- In return, request transparency, through Kanban boards and wikis, so you can drop in anytime to see how the work is progressing
- Agree clear decision making norms
- Go for joint tasks, rather than isolated ones, to avoid reinforcing isolation
- Create a shared identity within the team, which echoes the company mission. Use it as a regular touchstone.
- More of your team are vulnerable, so give extra focus to diversity and inclusion. Start team meetings with a check in, allowing people to score their energy from 1-10, with no judgement. Encourage peers to support one another.

How do we meet?

Fewer opportunities to connect necessitate good meeting hygiene.

- Set a clear agenda in advance
- Start with the decisions the group needs to make
- Consider allowing people time to review material in silence. Then open for discussion
- Designate a clear chairperson to run the agenda, keep to time and achieve the outcome
- "Stack" contributors who want to comment, so each gets queued
- Don't feel obliged to wait for a meeting. Some video conferences are best done unplanned.
- Take notes live into a shared wiki, and create Kanban cards for all actions, so there is a live record, and to avoid re-work

Notes from the field

...

Remote diary studies

••• Dear (virtual) diary...

Human Signals called for a research technique which would reveal changing habits, attitudes and motivations over time. EY Seren researchers chose an ethnographic, longitudinal method called a **diary study** to gather **rich qualitative data** on their experience of life during the pandemic.

Research participants are asked to **log key activities on-the-fly via a private WhatsApp channel** and reflect on their experience and emotions at the end of each day. This approach is proving ideal for **gathering insights from participants remotely in the context of the C19 lockdown**.

Researchers respond rapidly to emerging events, **probing participants for vital information in real-time** as their experience unfolds.

Notes from the field



Guy Simpson



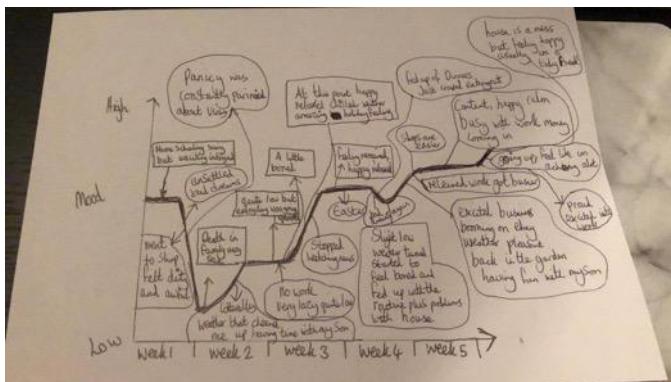
Victoria Rogers

Rather than asking participants to remember what they did or how they felt in the past, interceptive messaging allows participants to respond in the moment with messages and photos via a tool they have at their fingertips – WhatsApp.

The tool's familiar and light-touch nature makes it perfect for engaging hard-to-engage individuals like busy health professionals and parents juggling work with childcare.

Why virtual diary studies?

- **Discovering the New:** Ideal for revealing territories for new product and service development
- **Getting Personal:** Diary studies are up close and personal – a rare opportunity for access to customers' lives, thoughts and feelings on a very human level
- **Revealing Authenticity:** Participants respond in their own time, in their own environment. This facilitates authentic responses on a deep level
- **Understanding Context:** We learn about the environment that a product or service is being (or will be) used. This often reveals unexpected challenges and opportunities that wouldn't be revealed in a lab or interview
- **Uncovering Insights:** Diaries generate a lot of data (which requires sifting), but the result is often surprising insights which might not have registered on a survey or interview
- **Achieving Depth:** Researchers conduct depth interviews at the end of the diary study to help the team correctly interpret the content shared in the diary updates



In-diary exercises produce rich participant artefacts such as this mood chart

10
Participants

148
Days of
participant
diaries
(cumulative)

When lockdown is lifted. 19:33

Daily reflection - Struggled today because work was slow and I didn't have much planned besides that. I live alone so often feel lonely during lockdown and miss human interaction with family and friends.

Work - Thought about how my working life will change when I return back. Presumably we will still need to socially distance and I cannot see how this will be possible - the classrooms we get taught in won't be big enough to accommodate everyone at a 2m distance. I wonder if my company having to adapt the office will delay my return back to work.

Thanks [redacted] for such detailed reflections - this is great! 21:07 4d

Apart from the 2m distancing, will you looking for your employer to take any other measures to ease your comfort levels returning to the classroom? 21:59 4d

Access to hand sanitizer & signage to remind people what to do. 22:03

I would also expect the office to have the minimum number of people required to be there. So, if people can work from home, I would want that to happen so everyone isn't on top of each other. 22:03

TODAY

I have spent the morning volunteering at a local food bank. I am also part of a COVID 19 group that helps those in isolation with shopping etc. I have been to Tesco this afternoon to shop for 3 people who can't get out. 14:00

Before COVID 19, I was interested in volunteering but never had the time. I am really enjoying being able to help others and I'm hoping to be able to keep volunteering when I go back to work 14:00

I have been set some assignments from work which are due tomorrow morning. Work giving us flexibility with assignments has meant I can structure my volunteering around that which has been nice. 14:02

Type a message

Secure, private WhatsApp channel between researchers and participant

Part 2: Daily reflections – potential topics

- | | | | | | |
|------------------------------|---|--------------------------------|--|-------------------------|--|
| Trust | What does it take for you to trust people, companies, services and organisations during the pandemic? | Loss | We've all lost something during the pandemic. What have you lost and how are you reacting to this? | Health | How are you thinking about health at this time? How could technology and health data help us relax the lockdown? |
| Family & finances | Have you or family members supported one another financially during the pandemic? | Buying new or making do | How has the pandemic affected your shopping habits? | Digital services | Are digital services e.g. banking, media, telecoms etc. living up to your expectations? What could they be doing better? |
| Work | If you're still working in your normal workplace, what are your reflections on new procedures? If working from home, what would you expect when you return to your workplace? | Customs & rituals | The things that are integral to our way of life e.g. shaking hands or attending a religious service. How are these customs changing? | Adapting | We're all being forced to adapt. Have you tried doing something differently or learnt a new skill during the pandemic? |

Participants are provided with a framework to guide their daily reflections

References and Next Edition

...

••• What next?

We're taking an iterative approach to this research, working in 2-week sprints to continually challenge our assumptions and release what we discover to our community. If you want to share your opinion, get earlier editions or find out more about this research, please let us know.



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Edition 1 of Human Signals is still available via the EY Seren website

- 1. New purpose in service
- 2. Straining digital capacity
- 3. Health evidencing and etiquette
- 4. Homification of work
- 5. Adapting and becoming more adaptive
- 6. Enterprise agility tested
- 7. We're all vulnerable

The image shows the front cover of the 'Human Signals' report, Edition 1, dated April 2020. The cover features a photograph of two people in a dynamic pose, one in a red jacket and the other in a blue jacket, against a dark background. The title 'Human Signals' is at the top, followed by 'Exploring emerging human behaviour and purpose during C19'. Below that is the subtitle 'Tracking today's challenges to find tomorrow's solutions'. The report is described as a 'rolling research project' that helps organizations achieve growth by serving the needs of people, communities and the planet. It details the methodology, including desk research, depth interviews, diary studies, and quantitative surveys. The report also discusses the starting hypothesis that human behaviour has changed significantly and how it will need to change to meet new needs. A sidebar on the right provides an overview of the insights in the issue, the anatomy of an insight, and author bios for Peter Neufeld and Joel Bailey.

A rolling research project
EY Seren helps organisations achieve growth by serving the needs of people, communities and the planet.
We're running 2-week sprints of mixed method research to understand how the global pandemic is changing how we live and how we work.
Our starting hypothesis is that human behaviour has changed 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 we are running:

- Desk research across over 100 sources
- Depth interviews with people, virtually, in their own homes about what really matters to them 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 C-19 is transforming the role of design and delivery
- Quantitative surveys to validate and scale our insight

We're taking an iterative approach to this research, working in 2-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.

Insights in this issue

1. New purpose in service	2
2. Straining digital capacity	3
3. Health evidencing and etiquette	4
4. Homification of work	5
5. Adapting and becoming more adaptive	6
6. Enterprise agility tested	7
7. We're all vulnerable	8

The anatomy of an insight
Each fortnight 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 this document.

Title of the insight
Keypoints
Supporting evidence

How long will it last?
Implications today
Implications tomorrow

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Page 16 - How world-leading value creation businesses do it remotely

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Page 17 - Questions leaders should consider to improve remote working maturity

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