

Post- isolation



A toolkit for U.S. businesses: *How brands can use CX for a human—and humane—response to the COVID crisis.*

HUGE

An empathy problem.

Since the novel coronavirus struck, the world is awash in numbers. The sheer volume of research pouring in—and the pace at which it's hitting—can overwhelm even the most seasoned quant expert. Coming directly behind the numbers are wave upon wave of thought leadership, rolling in from every sector. It can be overwhelming. Strike that. It is overwhelming. For everyone.

Amid a deluge of data, Huge asked the questions we always ask: How can we better understand the human impact of the virus? How can we help businesses cultivate empathy for the realities people are facing? And how can we help industries serve and support these individuals when the consumer landscape has already been irrevocably changed?

So we turned to a tried and true CX tool: personas. Personas are composite views of user needs, mindsets, and behaviors, and they serve one purpose better than any other tool—empathy building.

If businesses don't understand what people are thinking, they can't have a CX strategy.

People are watching (and judging) what brands do. In fact, 62% of consumers believe we will not make it through this crisis without brands playing a critical role, according to a survey conducted by Edelman. More than ever, it's critical to get the customer experience right.

Methodology.

Between April 17-24, Huge conducted 21 in-depth interviews of Americans and combined what we heard with insights from the insights platform [GlobalWebIndex](#).

From these two sources, we extracted five distinct behavioral and attitudinal personas that indicate how people plan to approach being in public after quarantine.

Our research particularly focused on in-person interactions, with an eye toward helping guide brands that operate in physical environments—from banks to restaurants to retailers to airlines.

Five Personas.

Distinct mindsets show what brands can do to reach re-emerging U.S. consumers.

1



Band-Aid Rippers

Freedom focused.

2



Trapped Butterflies

Socially driven.

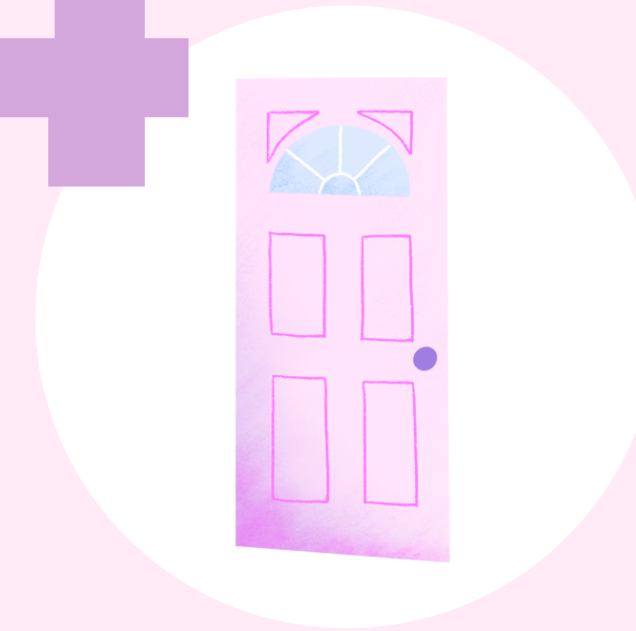
3



Polite Optimists

Cautious but eager.

4



Eggshell Walkers

Nervous to emerge.

5

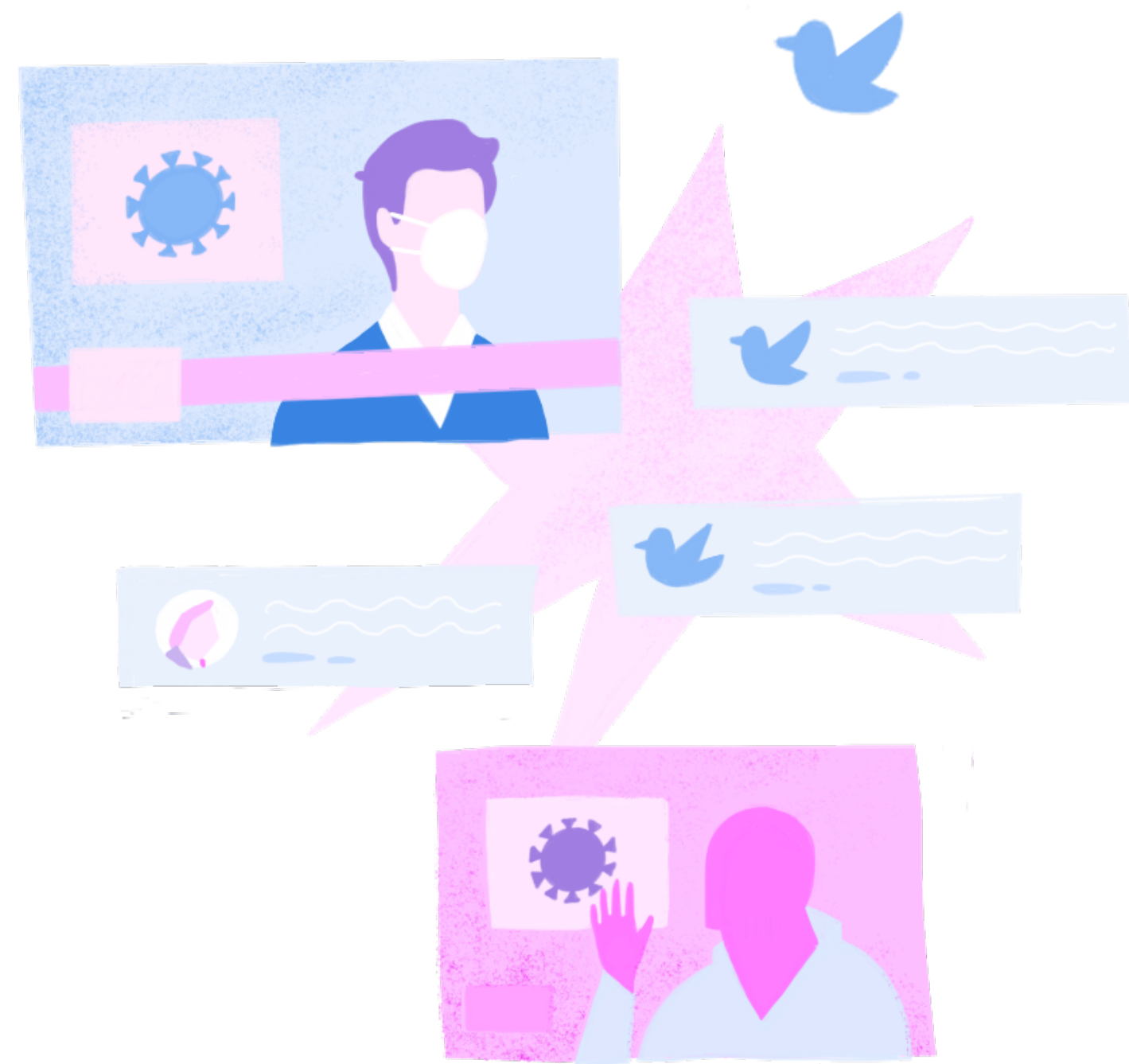


Fulfilled Homebodies

In it for the long haul.

Media consumption.

Commonalities.



Three key themes crossed all of our personas. The first is media consumption.

As much as everyone may wish the virus were not politically charged, it absolutely is. In our conversations, respondents' media exposure strongly influenced their perception of both risk and the pandemic's potential duration.

According to data from GlobalWebIndex, there is a correlation between political party affiliation and speed of returning to physical stores once they reopen. And a [Pew Research Poll](#) found that Democrats are more likely than Republicans to both view COVID-19 as a major threat and to believe that people across the country are not taking the virus seriously enough.

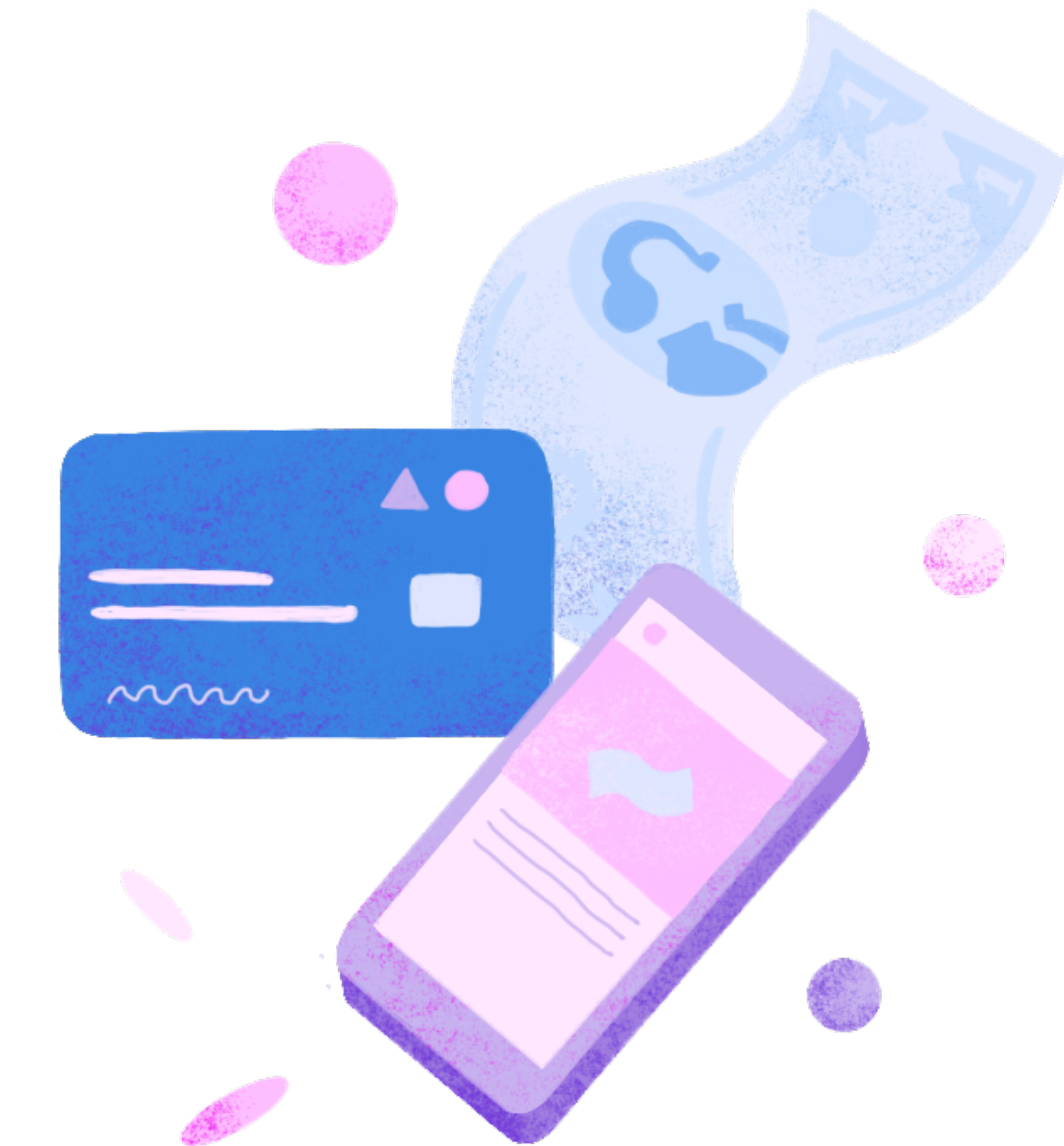
For all that, we have made every effort to focus less on political leanings and more on the actions that respondents said they were willing to take, which was related—but not solely tied—to political sentiment. Even so, when we used GlobalWebIndex to create and query custom audiences that map to our personas, we found that our first persona skews heavily Republican while our later personas skew Democrat.

Financial insecurity.

Commonalities.

People are guided by their wallets, a trait that the pandemic hasn't changed. Across the G7, 71% of people say their personal income has or will be impacted by the coronavirus (highest in Italy, U.S., and Canada), according to a study conducted by [Kantar Research](#).

We observed mild to severe financial anxiety across all five personas. For some, the anxiety is a singular focus. Others see silver linings: "Being laid off has probably been a godsend. I got more time to spend at home and with my kids," admitted Brian (40, Buffalo, NY).





Trust.

Commonalities.

Beyond personal connections to a business, consumers are calculating the risk of returning to public spaces by taking note of how businesses are adapting their policies and operations in light of COVID-19. Brands who communicate this information clearly are best positioned to build trust with customers. In general, consumers want businesses to follow the guidelines set forth by healthcare professionals and government officials in their community.

Regardless of the precautions businesses decide to take, it's important for them to clearly communicate these decisions to customers and employees. When we surveyed consumers about the importance of 17 different attributes related to post-quarantine shopping, respondents ranked "I want to know what retailers are doing to protect me even after the COVID-19 pandemic" as the most important.

In addition to setting clear expectations for everyone inside a business location, communicating these policies can also build consumer trust in a brand and may make the difference in customers choosing to shop in one store over another.

A never-ending calculation of risk.

In the following pages, we'll take a detailed look at each persona.

At the time of our interviews, protests weren't on anyone's radar. What respondents did express over and over again was a greater willingness to go out when doing so aligned to their passions. For one Eggshell Walker, a passion point was K-Pop concerts with her granddaughter. For another, it was going to their gardening club.

But passion, frustration, and grief are leading many right now to venture out and lend their voices to protests. Our research suggests that no one leaves their homes unaware of the risks coronavirus still presents. They're going out in spite of them.

As you read about how each persona perceives and calculates risk, bear in mind that the result of that calculation is changing daily.

These personas express five distinct approaches to re-entering physical environments such as retail stores, events, or workplaces.

Risk assessment isn't an activity performed once. It's done every day, every hour even, based on the latest info and the reality of the world.

Some respondents across these personas have already had to emerge for their jobs—which in some cases made them more comfortable emerging for other reasons, and in other cases made them more conservative, to keep their risk of contraction or transmission as low as possible.

Finally, on page 20, we offer a blueprint that allows businesses to better support individuals who are making these tough calculations.



Band-Aid Rippers.

A vocal minority, this group wants to reopen the country right now. The reasons for these attitudes are varied. Respondents may have observed minimal impacts in their immediate communities, which could make broad shelter-in-place orders difficult to rationalize.

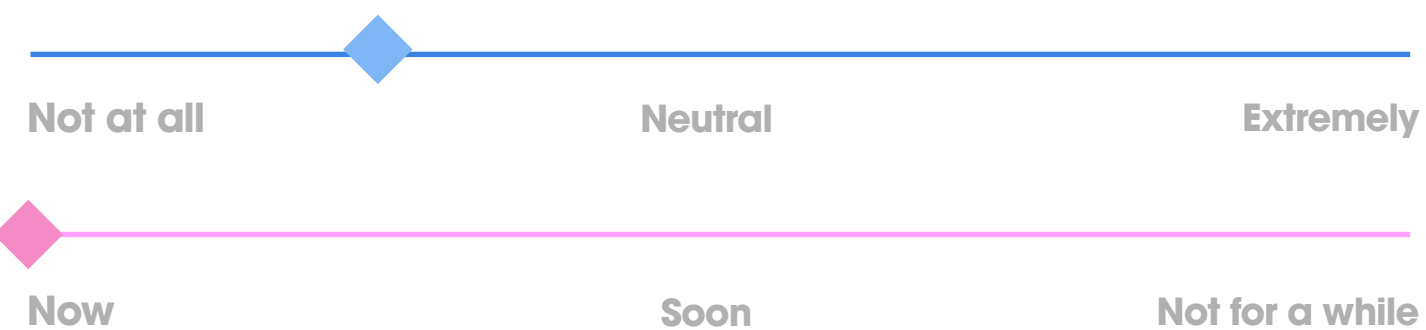
For this group, freedom is often a focus. Put another way, the fear of or frustration with change, especially if they don't feel warranted, may lead to these attitudes.

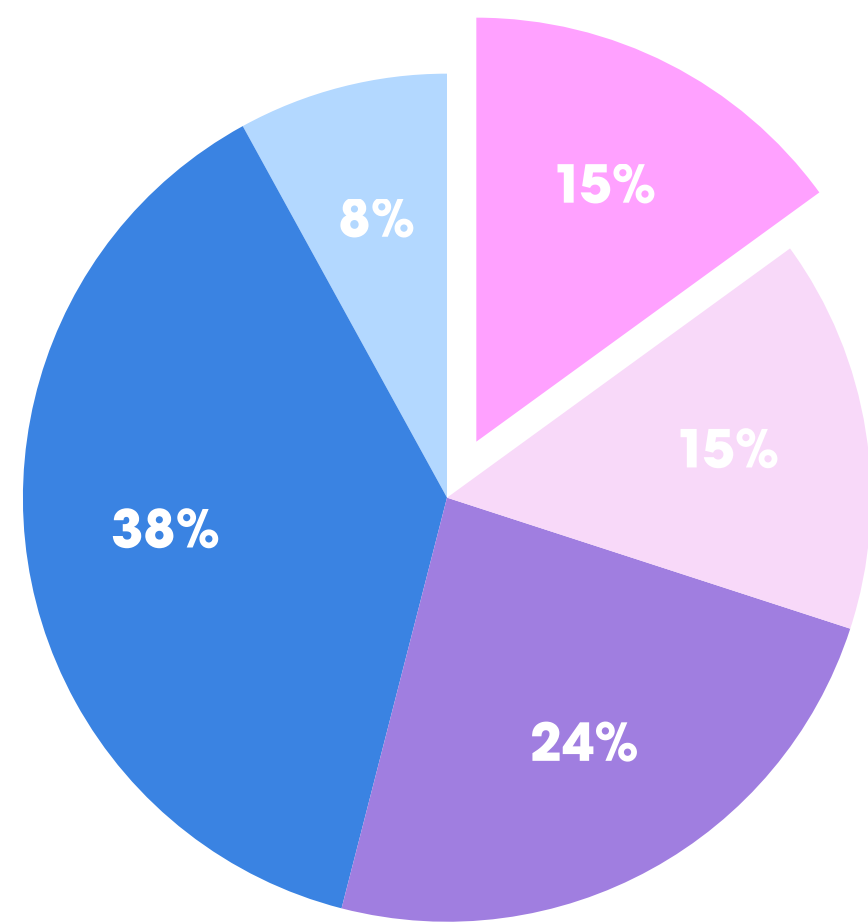
For others, current governmental constraints are viewed as a threat to their livelihoods. It's not that these individuals aren't thinking about risk—they may be focused on the economic fallout—but they're weighing risk differently than individuals that fit other personas.

“There's so many people that die from all sorts of things all the time and there isn't this extreme response,” Alena (39, Milford, MI) shared with us. “It seems crazy. I still don't personally know anybody that has it. Local response was minimal in the beginning. Now they're trying to make up for it by making it too strict ... Some of the latest restrictions just seem ridiculous.”

To be clear, COVID-19 is still a concern. A survey conducted by GlobalWebIndex found that of the 11% of Americans who plan to immediately return to physical store locations 22% are very or extremely concerned about the COVID-19 situation, compared to 19% who are not at all concerned.

Level of concern about COVID-19 Returning to public spaces





U.S. audience size: 26.7M

“I mainly miss being able to plan your own life. You constantly have to check ‘Am I allowed to do this? Am I allowed to go there?’ It feels really restrictive... Feeling in charge is what I miss most.”
—Alena (39, Milford, MI)

Band-Aid Rippers.

How brands can connect with them.

These individuals value brands that are rooting for a quick return as much as they are. But downplaying risk may not be advisable for companies, given the very real risks to employees and other customers if a brand is lax about preventative measures.

This group, some of whom are already ignoring the guidelines and gathering in large groups, are also most likely to react negatively to new preventative measures, e.g., requiring masks, taking temperatures, adjusting behaviors, or physical distancing.

Indeed, some businesses are training employees in de-escalation tactics in the event a customer refuses to wear a mask or follow social distancing guidelines.



Trapped Butterflies.

This persona generally consists of people living in urban or suburban areas who previously engaged frequently in social activities. For them, remaining separated from people is actively painful and mentally taxing.

Given how vital it is to them to be around others, they plan to return to public spaces as soon as local officials lift shelter-in-place orders in their region.

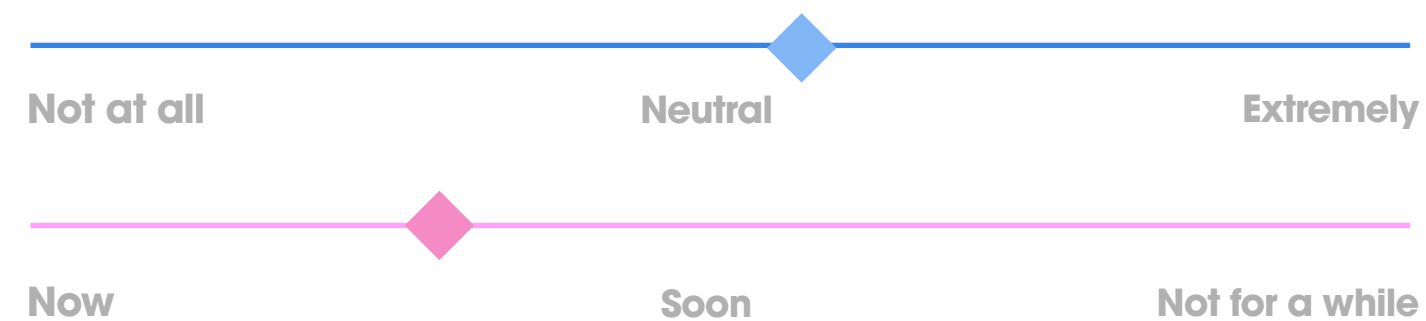
They will likely still use discretion when deciding which activities, public spaces, and individual businesses they deem safe, and many will continue to take precautions—e.g., wearing masks and avoiding close contact with people.

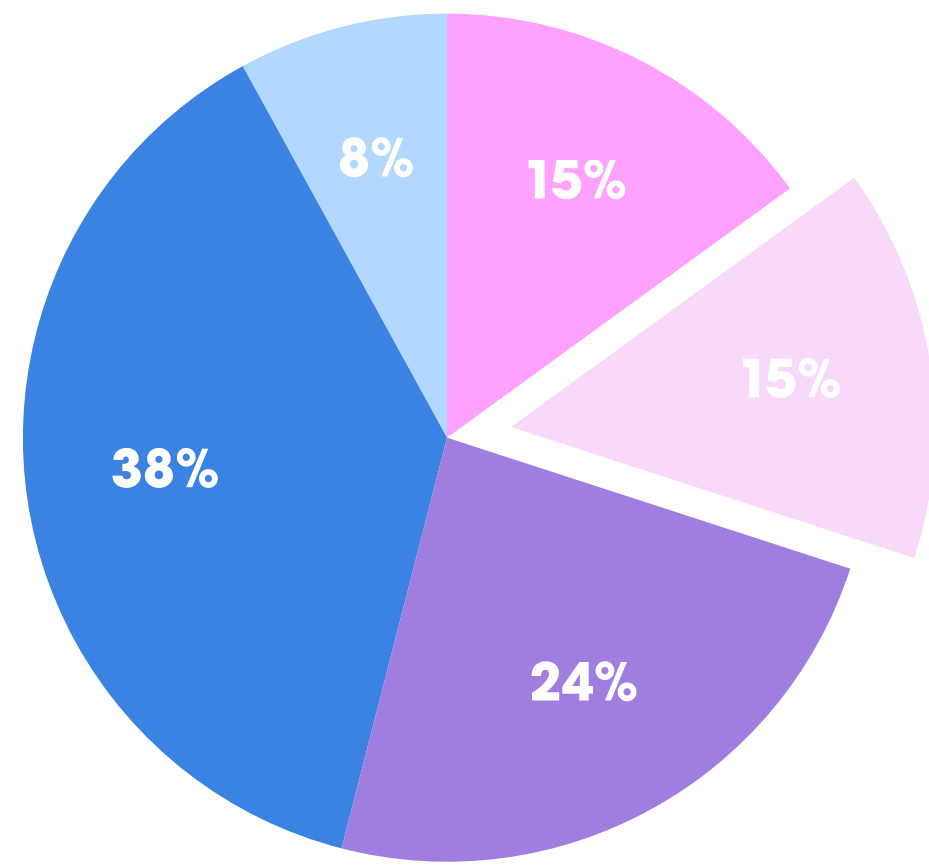
They're willing to comply with restrictions if it means life can get back to normal sooner rather than later, and to avoid another quarantine period. But this same group also wants their beloved public experiences to return largely in the form in which they last knew them.

“We all can't stay locked in our house for the rest of our lives. Life is gonna go on, you're gonna have to make adjustments. In 1918 [flu epidemic] I'm sure they were saying similar things. This is just a hill we have to go through. I'm not going to be afraid of life,” said Richard (43, Cincinnati, OH).

Level of concern about COVID-19

Returning to public spaces





U.S. audience size: 33.1M

“I'll go out in it, but I'll be extremely cautious. I've lived overseas during large disease breakouts, and there are ways of operating smartly that I'll adhere to.”
—Richard (43, Cincinnati, OH)

Trapped Butterflies.

How brands can connect with them.

This group wants to believe brands are doing their best. They're not inherently skeptical. Rather, they're looking for reassurances, so that they feel good about engaging with the world again when it's deemed prudent to do so.

As social butterflies, they're likely to report back to others about how they felt while out and about. For brands, providing these individuals with information about how they're being kept as safe as possible can turn them into brand advocates.



Polite Optimists.

This group is hanging back more than Band-Aid and Butterfly. “No, you first,” they’re politely thinking. They’re prepared to wait until they’re assured it’s genuinely safe to venture out.

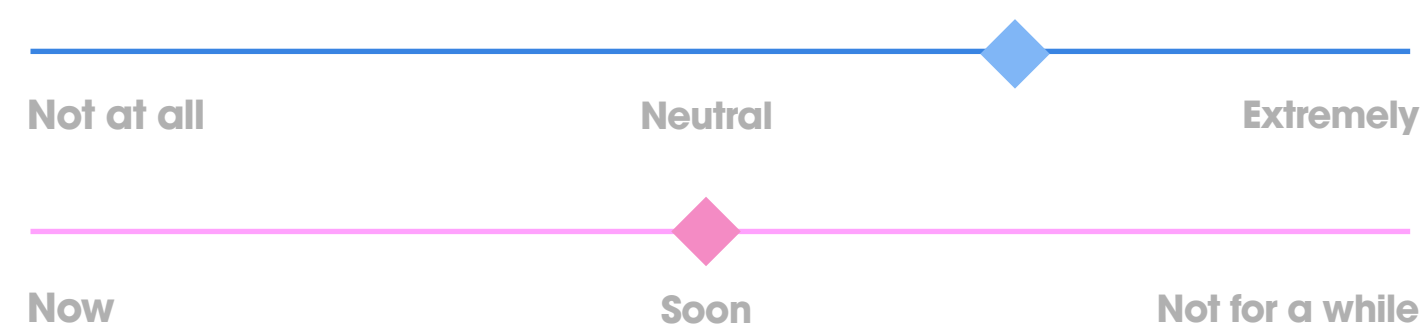
They plan to watch the case numbers in their area for a couple weeks to see if things will get worse before they put themselves at risk. Once they feel the risk is sufficiently low, they will relish returning to their previous activities.

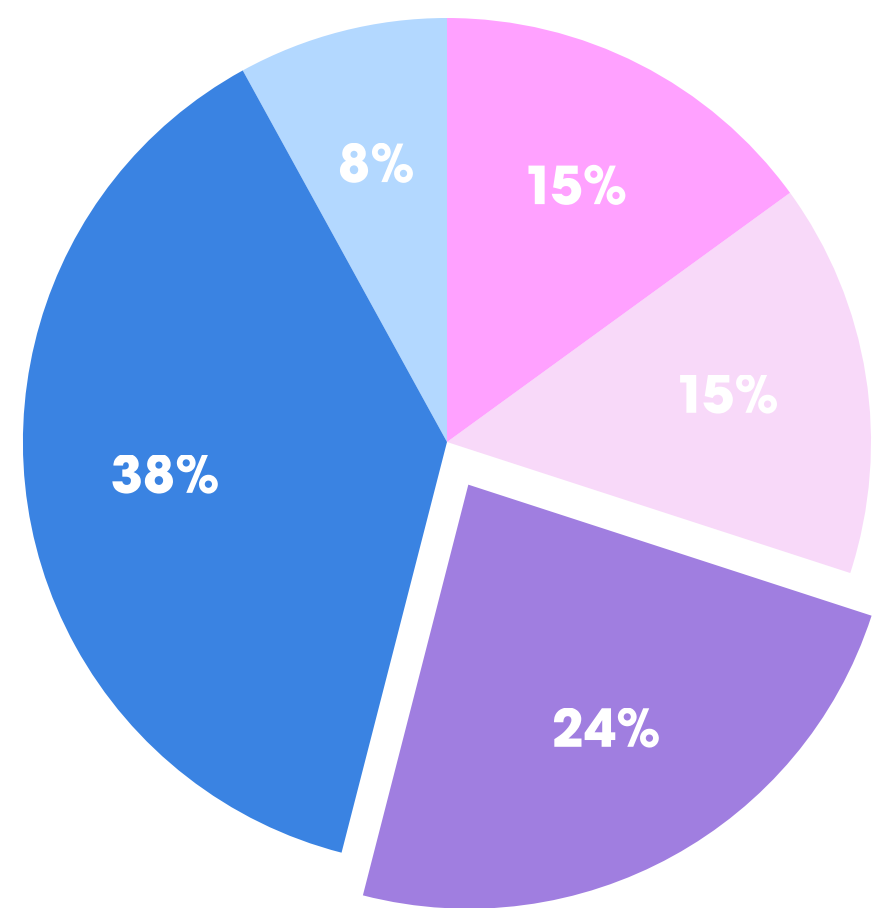
GlobalWebIndex found that 41% of surveyed Americans (n=952) who have the Polite Optimist mindset reported they will continue their gym memberships, will continue eating out at restaurants once they feel it’s safe, and will once again visit bars and cinemas after the outbreak.

“I’m ready. I’m excited. Not really nervous because if something does happen, we’ll find out because I won’t be the first phase to go,” acknowledged Candace (26, Dallas, TX).

This group calculates whether to do something on an activity-by-activity basis. If things seem safe, they’ll begin re-engaging, focusing on passion areas first and holding on to newly acquired digital habits in other areas. As a result, they may be more likely to retain those digital habits longer than Personas #1 or #2, and potentially forgo switching back to physical equivalents if they’re not missed as much.

Level of concern about COVID-19 Returning to public spaces





U.S. audience size: 49.9M

“If I go to a wine bar and it’s packed, I’m turning the car around. We need to ease back in, not have everybody going out the first Friday and having a big blow out and ending up right where we were.”
—Harold (54, Yorba Linda, CA)

Polite Optimists.

How brands can connect with them.

Polite Optimists want businesses to follow all recommended guidelines, and are likely to engage in contactless commerce sooner than they’re willing to return to physical spaces. Curbside, takeout, and delivery will all go over well with this group.

“I’ll wait to go to restaurants. I’ll do takeout. I love to eat out, I’m a big foodie. I’ve been holding myself back because I don’t know who’s cooking the food and if they’re healthy—I’ve been doing all the cooking,” said Sun-Hi (39, Queens, NY).



Eggshell Walkers.

“Anxious” describes this group. Though their work may require them to emerge sooner than they may prefer, they express less joy or optimism over the return to public life.

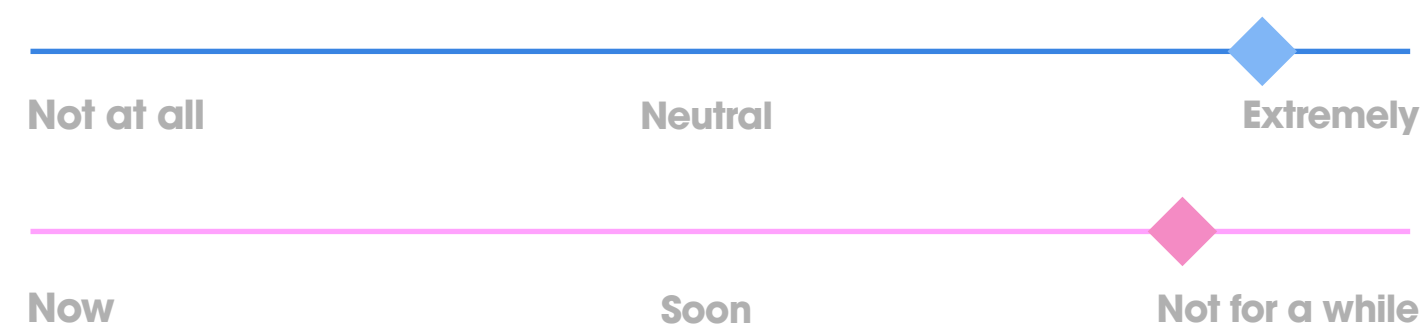
This anxiety often seems tied to the possibility that they or members of their household are at higher risk for contracting COVID-19 and have taken this to heart. They also may know people who have fallen ill or died as a result of complications from the virus, and so the consequences of the illness feel quite real.

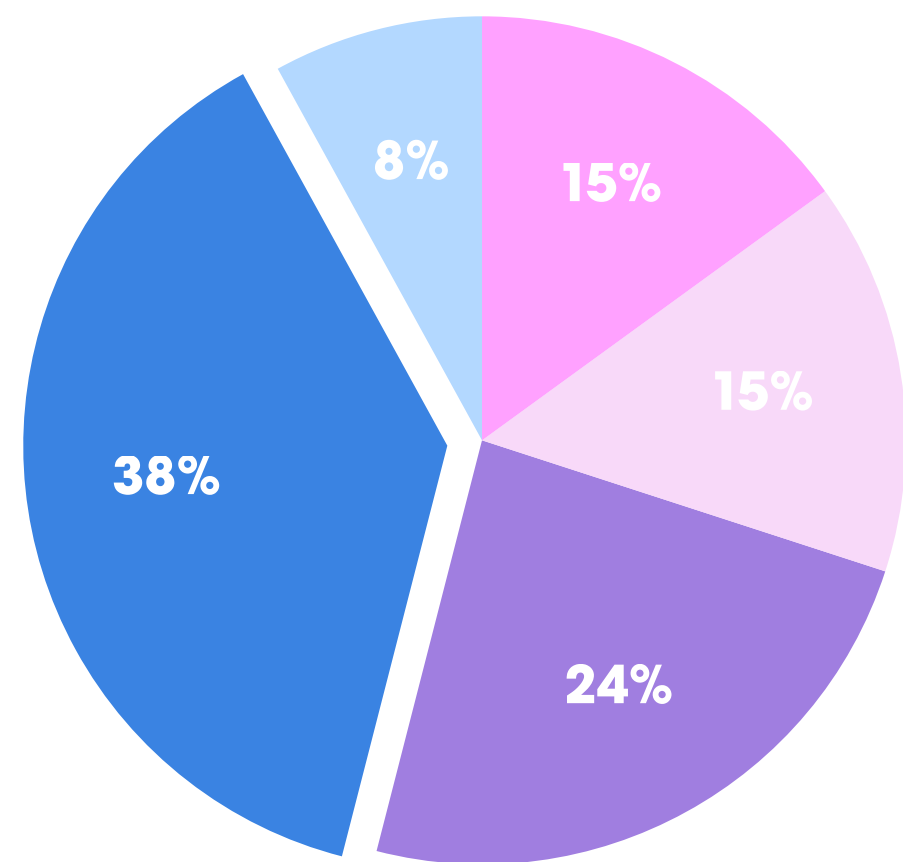
“My household isn't having any of it because we can bring something home and kill my mother.” explained Tamera (45, Savannah, GA), whose locale has already lifted restrictions.

This group expresses its fears of a second wave of infections far more readily than the previous personas. They plan to wait much longer—at least four-plus weeks—to return to public activities after local restrictions are lifted because they perceive the risk as a matter of life or death.

“Once they start opening, I think we should stay at home 3-4 weeks to see what happens. I don't want to be part of the trial. No thanks. I'd rather sit down and watch,” shared Jacinta (35, Denver, CO).

Level of concern about COVID-19 Returning to public spaces





U.S. audience size: 76.1M

“I want to sit back and see how it progresses and if it a second wave doesn't happen. I'll personally wait until about July to go out, but still avoid crowds.”

—Nate (30, New York, NY)

Eggshell Walkers.

How brands can connect with them.

Only data-driven reassurance will make the Eggshell Walker feel it's safe to return. This group will exercise the most caution when returning to public places.

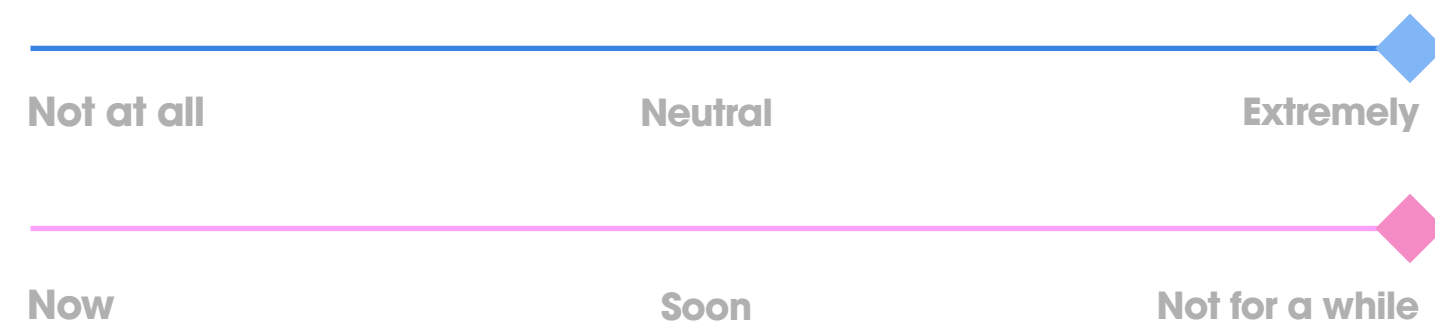
Eggshell Walkers have high expectations that businesses will work to limit community spread. They want to know that a retail space has been thoroughly cleaned and that customers and employees have been tested and aren't sick. Some also look even deeper into what businesses' sick leave policies are for their staff, to know that ill and/or exposed staff are incentivized to stay at home.

For this group, reassimilating to the real world may be done by proxy, given others may be picking up a favorite item on their behalf. Connect to this group through take-home materials and express what your brand is doing to protect them.

Fulfilled Homebodies.



Level of concern about COVID-19 Returning to public spaces



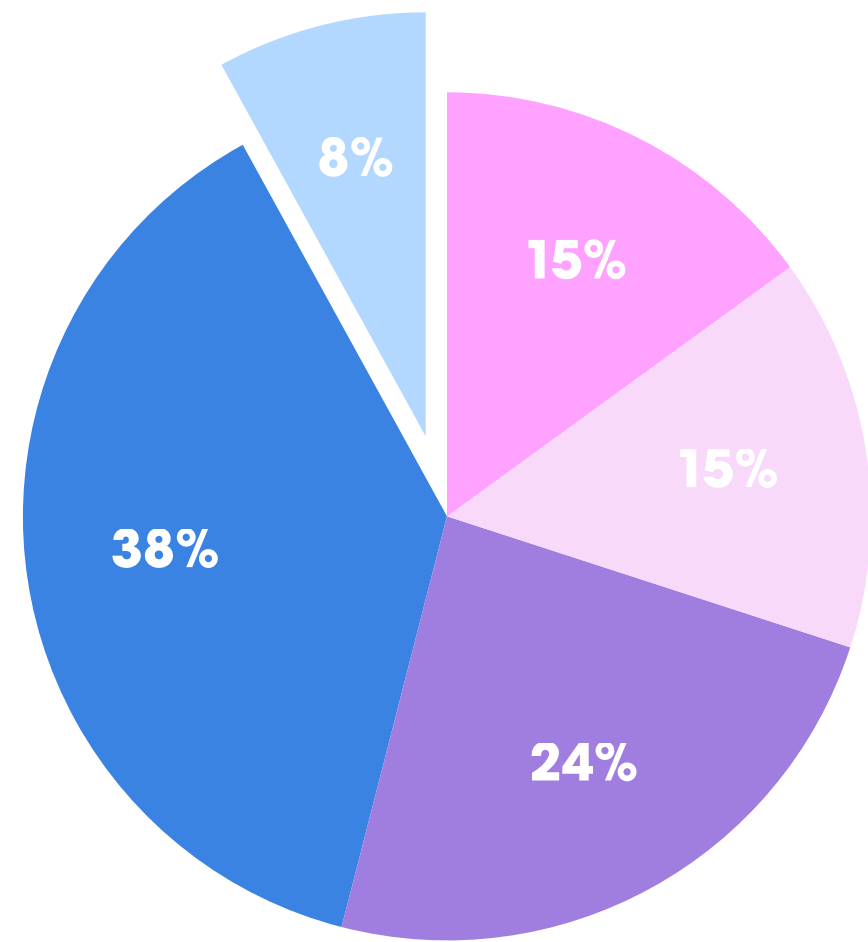
Admittedly, the final group was the least expected. This group isn't just delaying their return; they're not even focused on it. Whether because they've found satisfaction in their home life or because they have the greatest anxiety about COVID-19, this group is making their life at home their new normal.

In a national survey (n=952), GlobalWebIndex found this group is more likely than others to exercise at home (46%) and work from home (35%).

Quarantine has solidified these individuals' preferences for staying home, focusing on themselves, solitary hobbies, and their families. While some might tend toward anti-social, others in this group have simply adopted digital social tools to fulfill their need for connection.

GlobalWebIndex data shows that 60% of this group reported they don't plan to visit large outdoor venues, like sports stadiums or music festivals, for a very long time. Similarly, 68% of this group report they don't plan to visit large indoor venues, like concert halls or cinema complexes, for a very long time.

"This has shown us that we don't really need to go to movie theaters and restaurants anymore. It hasn't been a big deal to not have those in our lives for the past few months. We only occasionally went to movies before, now we probably won't," shared Charles (50, Crosby, TX).



U.S. audience size: 20.6M

“We’ll probably try to maintain the stay at home as long as possible. If we’ve learned one thing from this, it’s that we were semi hermits to begin with and now it just seems like it’s okay.”
—Charles (50, Crosby, TX)

Fulfilled Homebodies.

How brands can connect with them.

Products and experiences that they can enjoy at home will appeal, e.g., meal and cocktail kits, hobby starters or content, streaming entertainment, etc.

This group still enjoys social contact, but is less frustrated by the digital nature of it these days than individuals in the other persona groups. Brands with rich, high-quality digital channels will gain this group’s appreciation.

Business playbook.

Huge also conducted its own quantitative survey (n=1,500) specific to retail behaviors and expectations for when COVID-19 restrictions are lifted. The following two considerations emerged paramount: “I want to know what retailers are doing to protect me even after the COVID-19 pandemic” (78%), and “I will avoid busy stores and shopping centers” (68%).

When respondents considered the measures they want to see retailers take once COVID-19 restrictions are lifted, the following items were deemed most important:

- Retailers’ ability to express online how much product is in stock in stores (62%)
- More transparency around what companies are doing to protect store associates (61%)
- Reassurance from online retailers that their e-commerce practice is safeguarded and secure from the dangers of COVID-19 (60%)

- Stricter crowd or checkout-line management (54%)
- More spacious store layouts (54%)

But we believe businesses can go past these general tactics. The best brands will tune their message, their policies, their services, and their employee training to recognize the mindsets of these 5 personas.

To that end, the following page contains a blueprint for how brands can interrogate each persona type and hold up a mirror to their own practices to understand whose needs are being met and whose aren’t.

Workshop blueprint.

Use these questions to respond to each persona's mindset.

	Band-Aid Rippers.	Trapped Butterflies.	Polite Optimists.	Eggshell Walkers.	Fulfilled Homebodies.
Key drivers.	<ul style="list-style-type: none"> • Personal freedom • Return to pre-pandemic state • Minimal restrictions 	<ul style="list-style-type: none"> • Quickly returning once allowed • Resuming social activities • Avoiding another quarantine 	<ul style="list-style-type: none"> • Waiting a bit to return • Low-risk activities only • Uses data to evaluate safety 	<ul style="list-style-type: none"> • Health of themselves & families • Avoiding high-risk activities • Uses data to evaluate virus threat 	<ul style="list-style-type: none"> • Little interest in public spaces • Awaits scientific breakthrough • Personal enrichment at home
What services can we offer?					
What policies should we have?					
What messages can we deliver?					
How can our employees support each?					
How can we help employees who fit this persona?					

Finding humanity in the emergence.

What people need is a combination of head and heart. Across our research, we consistently saw the need for three key communication components brands should answer for:

What are you doing to keep customers safe? (head)

What are you doing to keep employees safe? (head)

What are you doing to make the world less scary? (heart)

While the first two are mandatory, the third is where the strongest brands will shine.

Can you envision fun ways to remind kids to socially distance so parents can relax more in your establishment? Is there a donation or give back option associated with checkout to show your values?

Can you care for your employees in such a way that their anxiety decreases and their team pride increases—which customers can then feel?

Consumers are in a watchful waiting moment.

“I’m just wondering how these places will have to change to adapt to the new normal and will they still be fun and welcoming, or will they be so restricted that you wonder ‘Why even bother?’ If I feel stressed, we’re just gonna be a family that stays home for coffee and Sunday brunch.”
—Tamera.

A post-isolation business strategy doesn’t have to be built around diffusing anxiety. It’s an opportunity for brands to send a message of solidarity and unity that brings people together—even while standing six feet apart. **H**

Detailed methodology.

Qualitative primary research.

Huge conducted a qualitative study with 21 Americans from April 22-24. Participants were recruited via a third-party vendor, and were paid a \$75 incentive to participate in a 45-minute one-on-one video interview with a Huge Researcher. Participants were recruited with the aim of creating a demographically and geographically diverse sample. We also sought to interview Americans with diverse experiences and mindsets relative to COVID-19, so we included the following screening questions and recruited a mix of responses:

- How has your job or source of income been impacted by the COVID-19 pandemic?
- How do you feel about returning to public spaces after the COVID-19 social distancing order is lifted?

Note: The names of those quoted have been changed to protect the privacy of our participants.

Secondary research.

To validate and substantiate our custom studies with additional layers of data, we also reviewed a number of reports and data sources related to the impacts of COVID-19. We've aggregated some of our favorite resources on this topic [here](#). In particular, we used the [GlobalWebIndex](#) insights platform to create custom audiences for each of our personas to better understand the differences and demographic make-ups of these groups.

Quantitative primary research.

Huge conducted a quantitative survey among 1000 US and 500 Canadian respondents. The survey was around people's likelihood of returning back to retail stores and expectations for safety measures once COVID-19 restrictions are lifted in the future to understand general sentiments on the pandemic as well as identify any country-level differences. The survey questions were developed by Huge Researchers and programmed in Qualtrics. The sample was sourced by a third-party panel provider.

Credits.

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