X-ii THE BEHAVIOUR CHANGE IMPACT INDICATOR

oomph

IN WITH THE NEW?

Critical insights from this in-depth study showing how COVID-related behaviour change is impacting organisations and their strategic transition planning.

CONTENTS

FOREWORD

2020 has been an extraordinary year. The spread of COVID-19 around the world has stopped us all in our tracks, and made us think and act very differently in many areas of our lives.

In other words, the pandemic has forced behaviour change upon us in a short space of time.

And this change brings both challenge and opportunity to businesses and organisations as they try to respond to the new behaviour of their customers and partners.

This guide will help organisations tackle those challenges and seize those opportunities.

Using insights from 3,000 people across 25 organisations, it provides constructive, practical and strategic advice for organisations as we all transition from a pre-COVID world.

STEPHEN PRIESTNALL
CEO & Planning Partner

THE RESEARCH

The results and insights in this study have been identified from a survey shared by a range of organisations with their customers and partners. The survey was shared by both B2B and B2C organisations in sectors including:

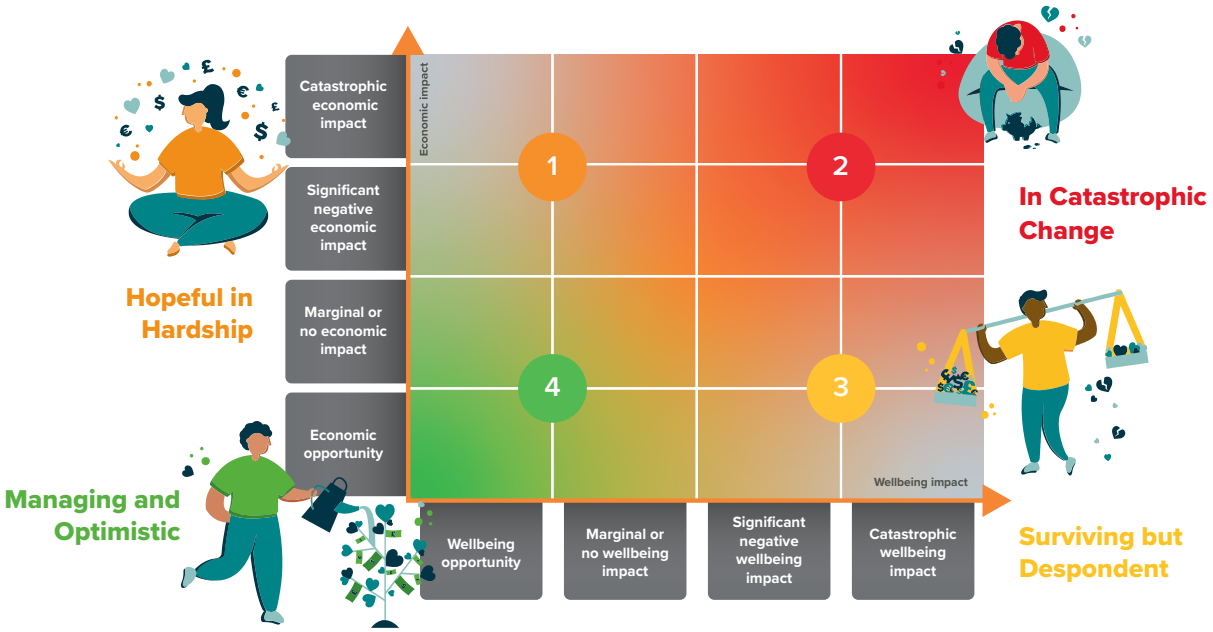
- Public
- Finance
- Entertainment
- B2B
- Health and Wellbeing
- Consumer Technology
- Charity

IN PARTNERSHIP WITH Decision Juice, Panelbase.com, halo., station10

The survey was ground-breaking in nature, because it measured people's perception of the impact of COVID-19 on their own wellbeing and economic status, as well as the impact on the organisation that had invited them to participate.

This was achieved by analysing both qualitative and quantitative data against oomph's Coronavirus Impact Indicator scale. This scale categorises the impact of the pandemic on respondents into macro and micro groupings, such as Hopeful in Hardship or Managing and Optimistic. These descriptors bring some real-life meaning to a quantitative measure that would be otherwise difficult to assess.

The CVII (Coronavirus Impact Indicator) Scale



Once organisations were able to assess their results on the indicator scale, and also study verbatim comments, they were able to understand how their customers and partners were affected by the pandemic, as well as how that might affect their customers' interactions with them, and any related need for changing services.

The outputs allows businesses to better plan their transitions for the coming months and years, knowing that their response is based on a better understanding of their customer needs.

DRAWING BEHAVIOUR CHANGE CONCLUSIONS

More than 3,000 respondents and more than 8,000 verbatim comments, provided between six and 12 weeks from initial lockdown measures in the UK gave our data analysts a wealth of information from which to draw insights.

After providing participating organisations with their tailored results, our experts then examined the consolidated data and soon observed key patterns in people's response to the pandemic over specific periods of time, independent of sector or type of business.

In other words, patterns of behaviour change common to all sectors began to emerge. New behaviours became learned, with an unexpected degree of resilience or willingness to change. These include, but are not limited to, changes in actions or habits related to transport, work, exercise, community, purchasing and socialising.

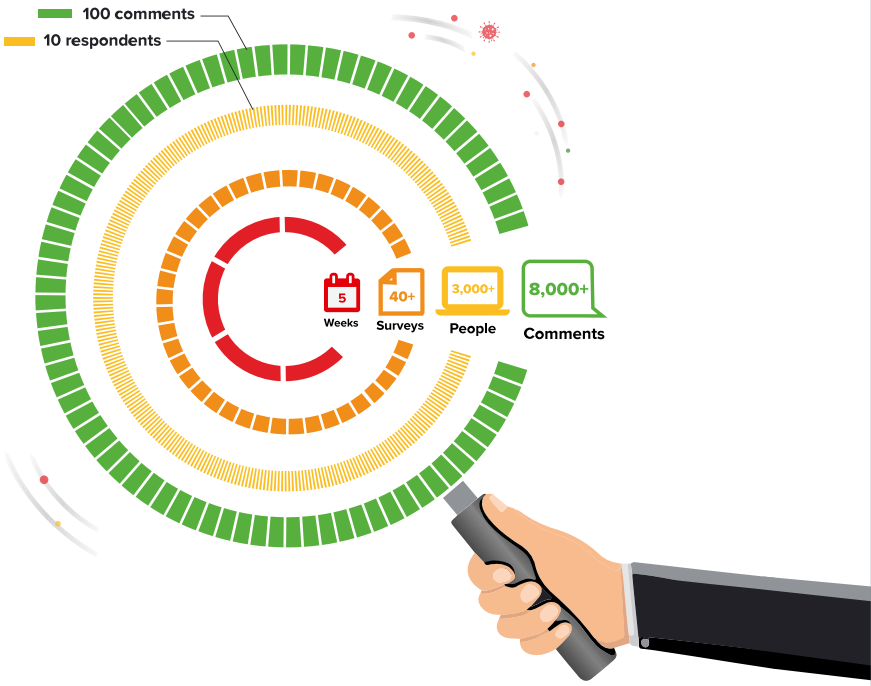
In fact, it became abundantly clear from the analysis that the single most important way to understand the impact of COVID-19 on customer experience is through the lens of behaviour change.

Consequently, to successfully emerge from the pandemic, organisations must embrace and respond to these changes in their continued provision of products and services to supporters, members, service users and customers. But how?

MAKING SENSE OF THE CHANGE

In order to support organisations in managing these swathes of change, this report describes areas of change that can be tackled against the backdrop of COVID-19.

To do this, we have been guided by the Behaviour Change Wheel (Michie et al., 2011), which takes a holistic view of effecting behaviour change. This model recognises that behaviour change can be influenced by people's capability, opportunity or motivation to change. Interventions and support for change need to address at least one of these in order to make a tangible difference.



In studying the consolidated data in the research, our experts identified a series of clear intervention themes that organisations should address to support change and to allow business leaders to transition their companies alongside their customers and partners. These themes each reflect or enable one of the three behaviour change model factors, either capability, opportunity or motivation.

Organisations can use these themes to guide and support customers through their change.

In order to provide tangible and actionable advice for reaching success in each area, we have drawn key guidance from the research insights for businesses to follow, and sought expert commentary to accompany that guidance. To further support our findings, we have also included the detail of the contributing insights, as discovered by our data and strategic experts.

i Verbatim comments have been adjusted for syntax and spelling.

PRODUCT AND SERVICE DEVELOPMENT

It might seem counterintuitive to be investing in innovation at this time but our insights show that for many organisations, the absolute opposite is true, and that customers are crying out for new product and organisational development. Therefore, an intervention based on innovation will help support customers' new behaviour, whether that be providing new motivation or opportunity.

GUIDANCE

People's behaviour is changing (Charm et al., 2020), so the businesses that they interact with should also respond with new products and innovation. In short, it's time to try new ideas while the door is open. Loyal supporters are there to help, and want to help, in these challenging times.

This is a particularly prescient time to reach out to those who have felt left-behind in the past, and to try to close the gap. If their needs are understood, along with all customers, they may be receptive and ready to be brought back into the fold.

Customers will be sympathetic to your change, and are likely to be more attracted to new products and services that allow them to manage the pandemic while still interacting with organisations and services. Seeking their feedback about even the smallest change is beneficial, as is informing them of changes that respond to that feedback.

EXPERT COMMENTARY

"For many of us, it's scary to innovate and try new things, whether that be in business or in our own lives. But it doesn't need to be if we just break it down into bite-size chunks. You don't need to turn your whole business upside at once. Your new product doesn't have to be perfect before you share it with people. If you make small changes, measure the impact, test and learn, you'll begin to understand the customer a lot more.

And most of all, consult the customer about their customer experience. That shouldn't be rocket science. I've seen months if not years wasted on getting something exactly right, only for product owners to find out that it wasn't what the customer wanted in the first place. Try to avoid that trap!"

Sue Carter,
Digital and Technology Consultant to public and private organisations

SEE ALSO

Balance disruption with communication... **pg. 09**
The necessities we just forgot we needed **pg. 31**

I'LL TRUST YOU MORE WITH NEW IDEAS NOW

KEY THOUGHT

For businesses servicing other businesses there is a significant minority that are seeing improved services post COVID-19. Given there is a strong sentiment that also sees opportunities to build on new services, B2B organisations should talk to their loyal customers frequently about how they are using their services and use them as an innovation test centre for rollout to a wider group.

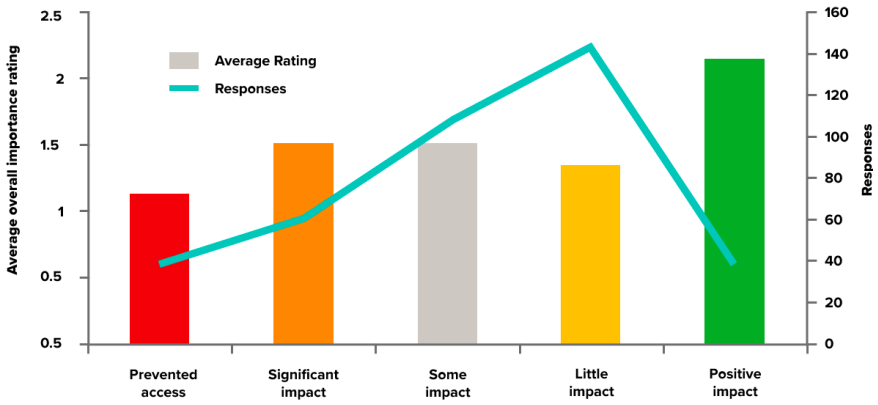
Around 15% of B2B respondents are saying that COVID-19 has had a positive impact on using their services. And this 15% are very positive about the value that the organisation can offer them through further evolution of services. It is not always the case that these respondents are those who saw the services as important, but at the very least they are a significant minority of service users and customers who would be prepared to be asked to trial new ideas for product development.

"There could well be opportunity in the short term as companies adjust to more remote ways of working."

The next most positive group to welcome support to lessen the COVID-19 impact are where respondents experienced a significant, or some, impact upon the ability to use services. So it seems there is a latent desire to see organisations change their services or delivery and as a result service users and customers will restart their engagement.

"Opportunity to show what they have done during the crisis and carry on building on this."

What impact has COVID-19 had on your organisations ability to use our products and services?



"Hope that this provides more opportunity to build on what we have learnt and move forward."

The overriding implication seems to be that change is now expected and will be supported. What is not clear is the time frame expectation on these changes before the opportunity for re-engagement is gone and the services are sourced elsewhere from more agile organisations. This varies between sector and organisation.

Look through the other lens - it may be tough but the business people you are helping want more help.

THE 'LEFT-BEHIND' BECOMING OUT OF SIGHT AND OUT OF MIND

KEY THOUGHT

There is a significant risk that if organisations pursue an aggressive transformation strategy, this could run counter to the 'levelling up' conversation that is currently being had. There is an opportunity to enhance reputations for wellbeing and equality by targeting customers and service users that have low levels of accessibility or have been more negatively impacted by the pandemic and find new and innovative ways of reaching them. For example a supermarket may be better served by electrifying its van fleet and doing mobile rounds to sell from the van in hard to reach economic areas, than offering price discounts to attract customers back into large stores.

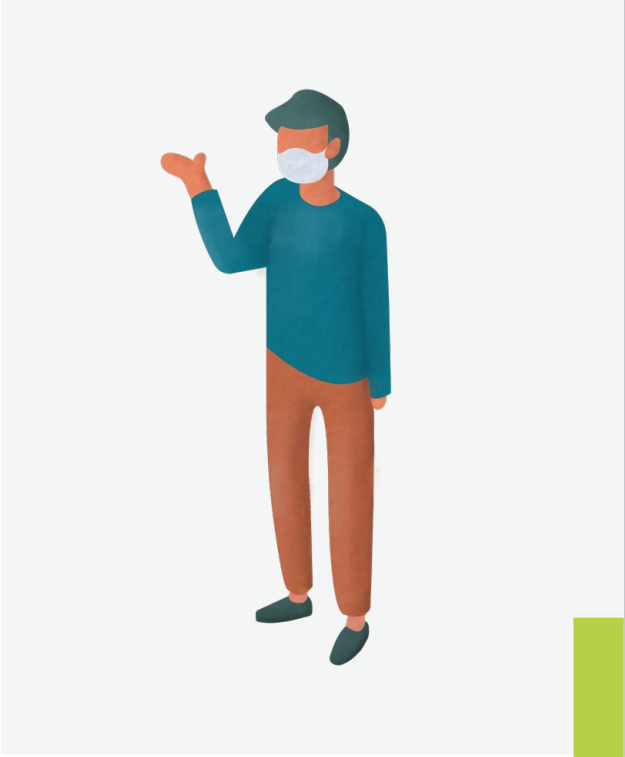
"I'm preparing for the worst case, redundancy, which would lead to a catastrophic economic impact, looking at all my options, from equity release, cashing in my pensions, to selling up to live in a mobile home, or abroad, I have even considered if there would be any point in continuing."

There is a significant correlation between those who feel they are not being helped through COVID-19 by their communities and those who see no value to be added by the organisation or sector against which they have responded.

This could be a cynical hard-to-please group, but some of the verbatims imply that for some organisations, COVID-19 is in danger of causing a wider gap between those who can access services and those who cannot.

For organisations where equality and levelling up is consistent with their mission, they could find this group and concentrate service development on improving accessibility to products and services.

Whilst this may not deliver to short-term economic goals, it may have a positive impact upon reputation and open up new opportunities to work to wellbeing oriented goals, for which there may be stronger stakeholder support.



The 'left-behind' have no desire to catch up. Could this be the time for you to address inequality?

COMMUNICATIONS STRATEGY

The overwhelming message for intervention here is to keep customers informed about the business journey (O'Halloran, 2020), so that they have motivation and capability to stick with the organisation and its new way of life. It's crucial that customers and partners know what businesses are doing and how they are responding, so that they recognise and appreciate investment in new capability and services.

GUIDANCE

People in the midst of change are hungry for knowledge and help; they want to know what's coming next, and how their own experiences will be effective. In times of innovation and response to the disruption brought about by COVID-19, it's important to keep shouting about it (Deloitte Slovenia, 2020). Customers also want to know how organisations are coping, so leaders shouldn't be afraid of being honest and at times, being vulnerable.

This is also a good time for organisations to reach out to their whole user base, to look for new customers who are keen to get on board, and to reach out to the under-serviced. But it's important to adapt communications to different audiences. One size will probably not fit all.

EXPERT COMMENTARY

"Helping your customers to be able to manage change has never been more crucial. For your role in this, it is important that your messaging is clear and informs your customer how it is going to drive value for them. Use a variety of comms and marketing channels, and if budget is tight, make the most of your owned digital channels, such as your email base and social media accounts. Right now, though nothing beats human contact.

There is a great opportunity here for your communications to be two-way. If you invite feedback and stories, there's a good chance that people will be happy to provide them. The benefits here are two-fold - people are, and feel, that they are being listened to, and their comments can provide content and context for your future testimonials and creative copy."

Adam Hopkinson,
Halo Media

SEE ALSO

Don't try to buy me back... **pg. 15**
Enterprise and agility... **pg. 21**

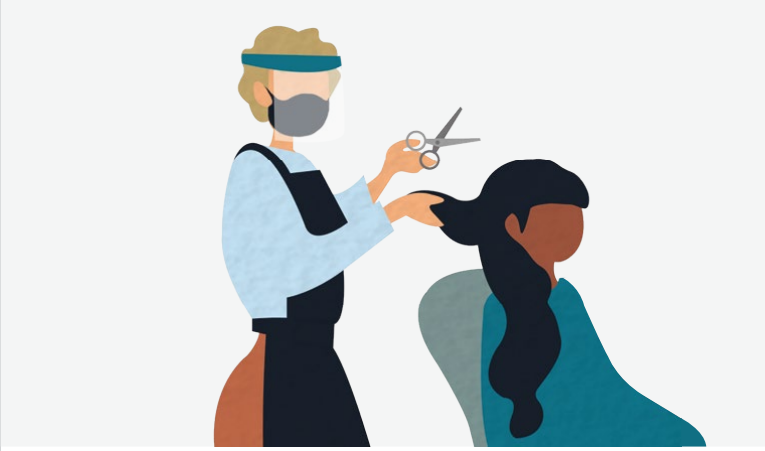
FOCUS ON MY HAPPINESS AND CONFIDENCE

KEY THOUGHT

In communications with consumers and businesses, concentrating efforts on individual optimism will bear fruit. People are nurturing their local community and support networks, so marketing messages that support this movement will be well received. Be sure to engage with your audience with a focus on the long term transformation, rather than just a short-term bounce-back.

The deep-dive here looks primarily at retaining existing customers who you know and cherish - a key planning outcome from the study.

One of the key trends in the survey is that individuals feel more positive about how they are coping and their prospects than how they feel about the organisation's prospects to which they are connected or from which they are receiving services.



Respondents are more upbeat as consumers than as business representatives (31% are Managing and Optimistic about themselves, compared to 25% who responded representing their organisation).

In a B2B context, overall respondents were less upbeat, but were still more positive about themselves than the organisation providing services (23% were Managing and Optimistic about themselves, but only 14% were the same about the organisation that provided services).

This highlights an interesting opportunity about how to retain customers – focus messaging on the individual to build on their comparatively greater confidence in the world around them. These messages will need to be subtly different in a B2B and B2C environment, but can still take advantage of the same trend.

In a consumer context, the opportunity is to emphasise how your brand can build on this personal happiness and associate it some of the key transformational trends also noted in the survey.

For instance, the consumer has a greater awareness of the community and locality of which they are part as a result of COVID-19; this emerging sense of a local support network, as opposed to a now-dislocated network that centred around the office and work contacts, may be one of the key factors driving this greater personal satisfaction.

Another factor is a greater cultural emphasis on individual wellbeing and health that is an inevitable consequence of a crisis triggered by disease.

Consumer brands have the opportunity to build on this new sense of community purpose, local support and convenience and physical and mental health to help. For many, this may well be part of the existing marketing, for others, it might be a nascent or comparatively hidden aspect of your culture that you can now emphasise.

For B2B, the same principles can apply about how you can help support your business community, or help your business clients do the same but as the survey shows, individual employees may not feel as confident about the business to business ecosystem, and potentially their place in it. This means they may be more interested in investing in themselves, their teams and their skills, while they wait for the business confidence to pick up.

For instance, training courses, originally set up for free to help people on furlough, have proved so popular that organisations are either now paying for their staff to access them, or ascribing significant value to justify renewing other existing services. This connects well with a product designed to build extra personal confidence, but which B2B organisations can see value in.

It is important to note that staying economically active during the pandemic is the most important of all the services across the board. This is more important than direct financial support that may have been more expected (such as help with payment terms etc.). As other factors like guidance and flexibility appear relatively high then it seems clear that organisations need to retain their customers by understanding their changed behaviours.

This is combined with the fact that ALL segments get typically more positive over time and that the data also suggests that as things get better, more trust will be put back on the organisation.

So it seems short term bounce-back is not the key play for retention, engagement and appropriate transformation is more likely to garner long term customer support. However, there is clearly an opportunity in the short term (that is, for the rest of 2020) to market products and services based on and encouraging individual optimism, even within B2B environments.

Emphasise customers' greater personal positivity by creating services to support them.

BALANCE DISRUPTION WITH COMMUNICATIONS THAT SUPPORT MY NEW WORLD

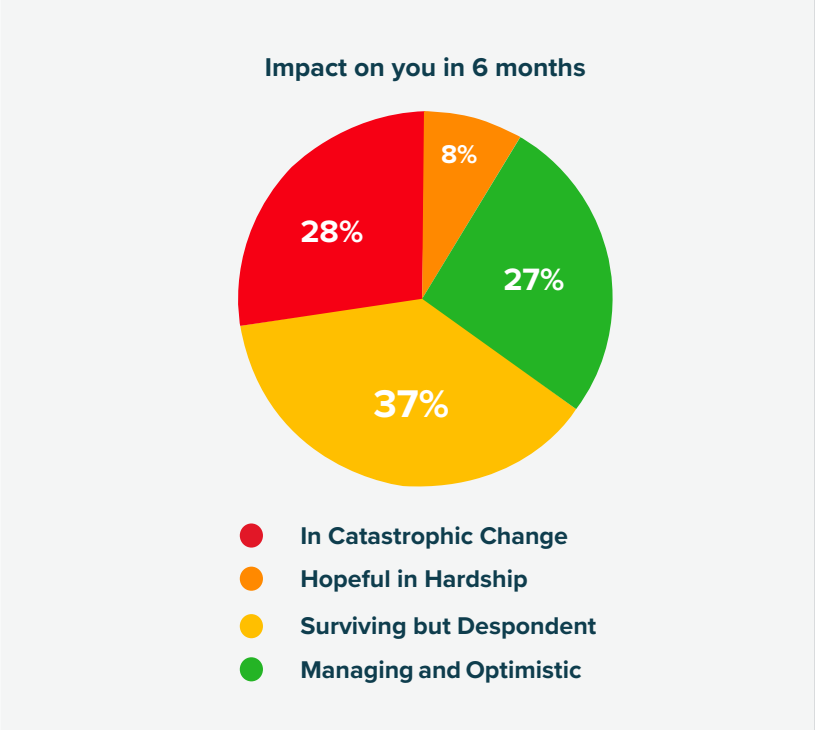
KEY THOUGHT

Use digital methods to update customers and partners about your new digital services; thereby walking the walk and supporting their new way of life. Their lives may be very different now, and people need to see and know that they're understood.

This insight emerges from findings in the Health and Wellbeing Sector, and the advice focuses on that section of the economy. As some of the respondents in this group were also in the Public Sector analysis there are some crossover similarities.

It is most noticeable for this group, both from the panel respondents and the various leisure and sports provider organisations users, that respondents feel most strongly impacted from a personal wellbeing perspective. They are also more negatively impacted than other sectors.

They have the most respondents compared with other sectors in the Surviving but Despondent category, reflecting the fact that their day-to-day lives are not catastrophically impacted economically and they feel they can get by, perhaps even comfortably, but they are concerned for the outlook in terms of happiness and wellbeing. They also do not see a significant change in a 6 month period.



"I am desperate to get back to swimming as it is my main way of managing my pain, weight and knee problems plus the social side of meeting my swim buddies. I think we will appreciate extended family more."

The quantitative data is however moderated significantly when the qualitative responses are analysed. It is the group who have the most positive support for the organisations - losing access to sports, therapeutic and activity based services is something they desperately want back. We can see this play out in a bigger international picture with the transformation of sporting events. Team games without crowds but accessible through streaming and terrestrial TV services would have seemed untenable before COVID-19.

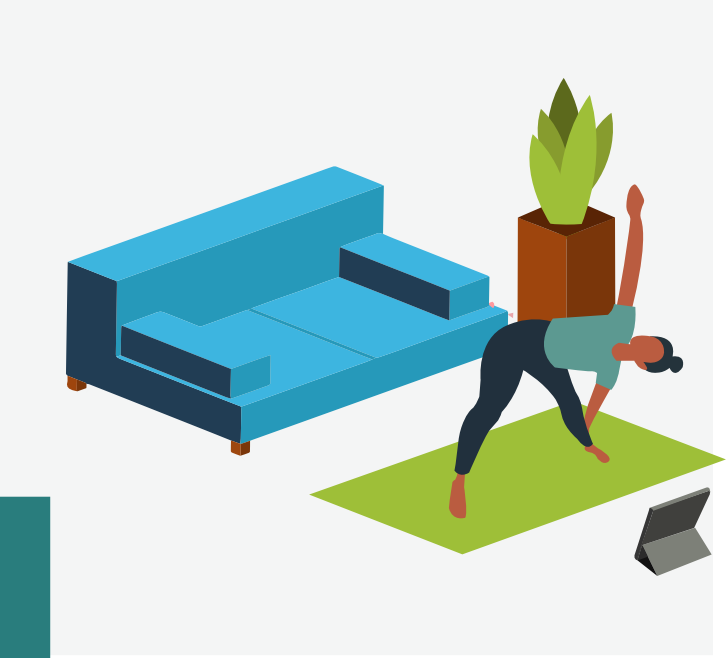
If we compare this dataset with the broader B2C data, we can see that there are a number of people who are in the Managing and Optimistic category who are spending less money and changing their behaviours towards a more exercise and wellbeing-aware lifestyle. So a key theme for this sector may be about new services users as well as looking after its existing customers.

There is a significant number of potential converts that expect to continue to spend less money on premium items (travel, consumer goods) and are now prepared to think about allocating their time to wellbeing related activities. The combination of this potential new customer cohort, together with new and innovative ways of delivering services, including online coaching and better digital communications, may go some way towards balancing the immense disruption that has been caused to this sector. As COVID-secure practices in wellbeing activities become more established, the outcome may be a broader member and user base, across wider age groups.

"I feel that now is the time to review including digital means in all of the Welsh Netball performance pathways as well as a positive online presence and a review of policies around gender in sport."

"Online wellbeing courses would be very helpful!"

There is no doubting the severe impact that health and wellbeing organisations have experienced and their users, members and customers are consequently being affected. The road to post COVID-19 transformation for health and wellbeing organisations will be hard, though currently funding models in publicly provided services typically remain in place. But, there is a growing number of people who will seek access to, and very probably pay well for, wellbeing-related services now they have experienced lockdown.



"Current levels of support are great, but need to gear up for lobbying to ensure that some of the positives from this situation are not lost in a rush to return to normal."

Wellbeing advisers often cite that working with clients needs at least 3 months to start to establish long term behaviour change. Those emerging from lockdown with a fresh perspective on wellbeing will have had well over four months of new thinking. At least some of that group will not want to change back.

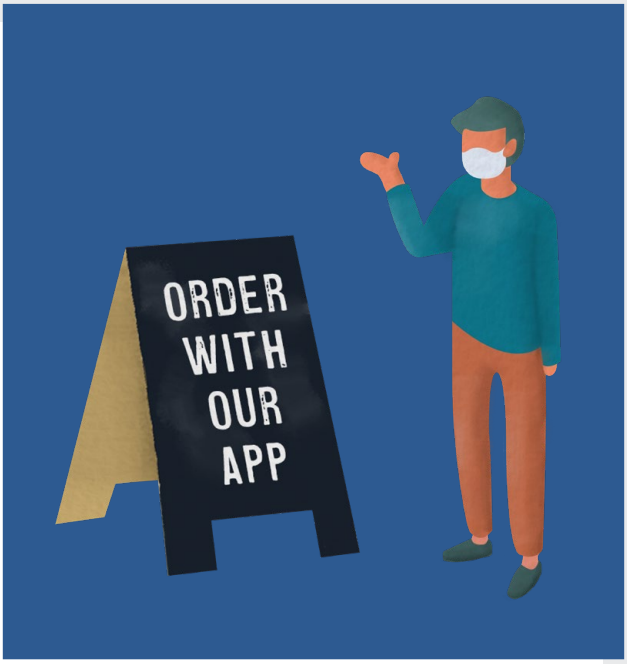
A new, post-lockdown target group?

DIGITAL TRANSFORMATION PLANNING

The study shows that as people turn to technology with increasing need during the pandemic, it's clear that digital competency from service providers is vital for survival, and that digital transformation must transition from optional to must-do (O'Halloran, 2020). This theme reflects two of the behaviour change influencers, as it addresses both customers' capability and opportunity to change their interaction with services.

GUIDANCE

The desire from organisations to join and benefit from the ever-developing digital world is not new - digital transformation has been a core focus for many years, perhaps as a target for some and as a reality for others. So the key recommendation here is don't delay; take the plunge (Saliola and M. Islam, 2020) - even in small ways - because customers want and need it. The report's insights show that those organisations that are prepared to innovate and change will be supported by their customers.



Consumers will join that digital journey, because they want and need it (Bages-Amat, Harrison, Spillecke and Stanley, 2020). A further note: on that digital journey, it's important to be inclusive and to not alienate those that feel left-behind - try to find a way to adapt for all.

For those organisations who are already far along their digital journey, it's important not to rest on the success to date. Technology never stops, and customers will be keen for more. Digital leaders must strive to keep their reputations by looking to expand, optimise and improve their digital offerings for the customer.

EXPERT COMMENTARY

"Digital transformation has been a buzzword for a long time, and stretches into every type of business. But where once a business may have been able to survive without it, it may now be the very thing that supports any kind of survival at all. The great news is that the majority of people want this to happen now. The doubters are more positive, the slow-adopters are faster, and the tech-savvy are willing to try anything you throw at them.
You'd be crazy not to take this opportunity to improve and embrace your digital services."

Stephen Priestnall,
Managing Director, oomph

SEE ALSO

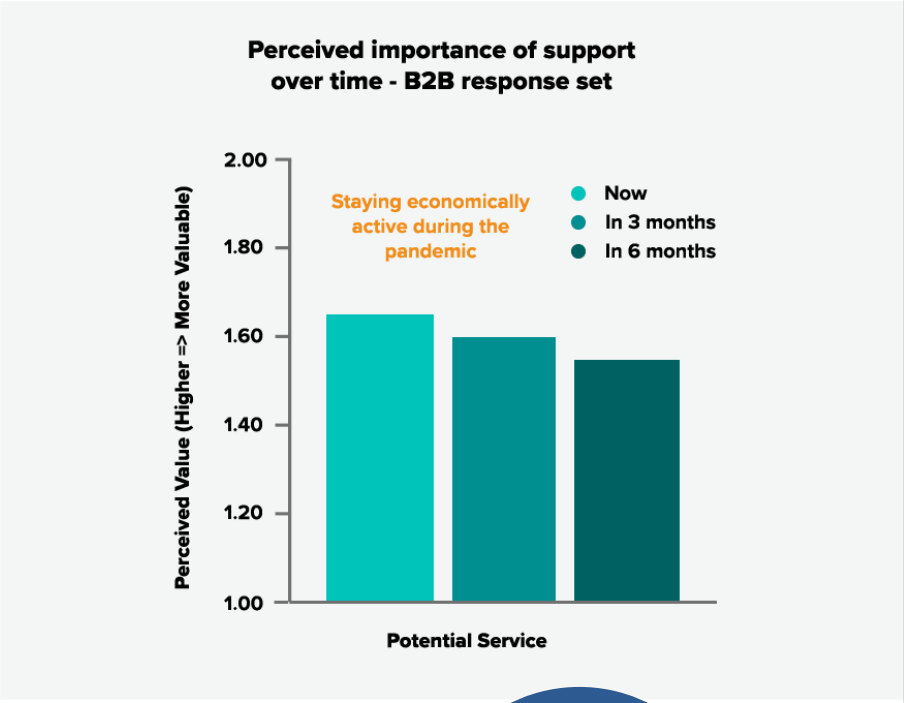
I'll trust you more with new ideas now **pg. 07**
The 'left-behind' becoming out of sight... **pg. 08**
Balance disruption with communication... **pg. 12**

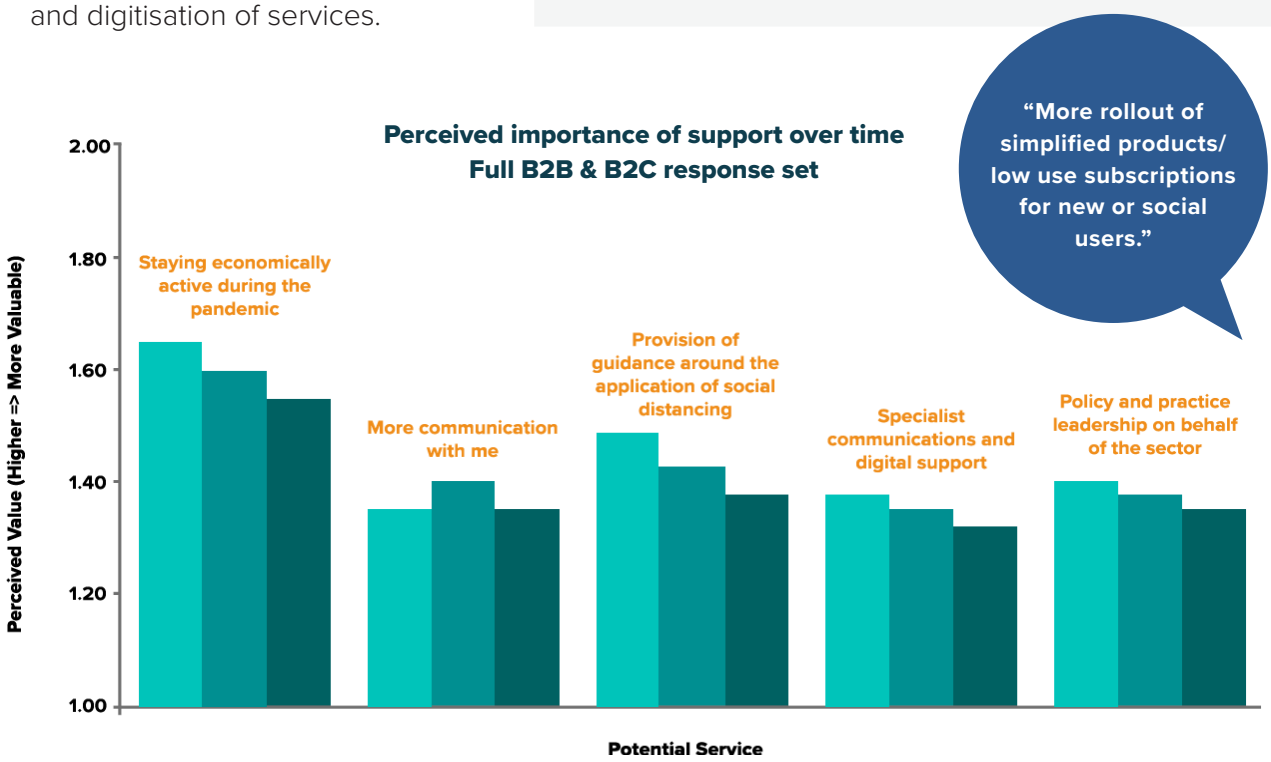
DON'T TRY TO BUY ME BACK TO HOW IT WAS

KEY THOUGHT

In product and service development, organisations should consider thinking beyond promotions and incentives and balance their strategies with actual change in delivery based on changing needs of customers. This may now be feasible as, with individuals having an additional need-state as employees, they may be more comfortable with change in the workplace to support these strategies.

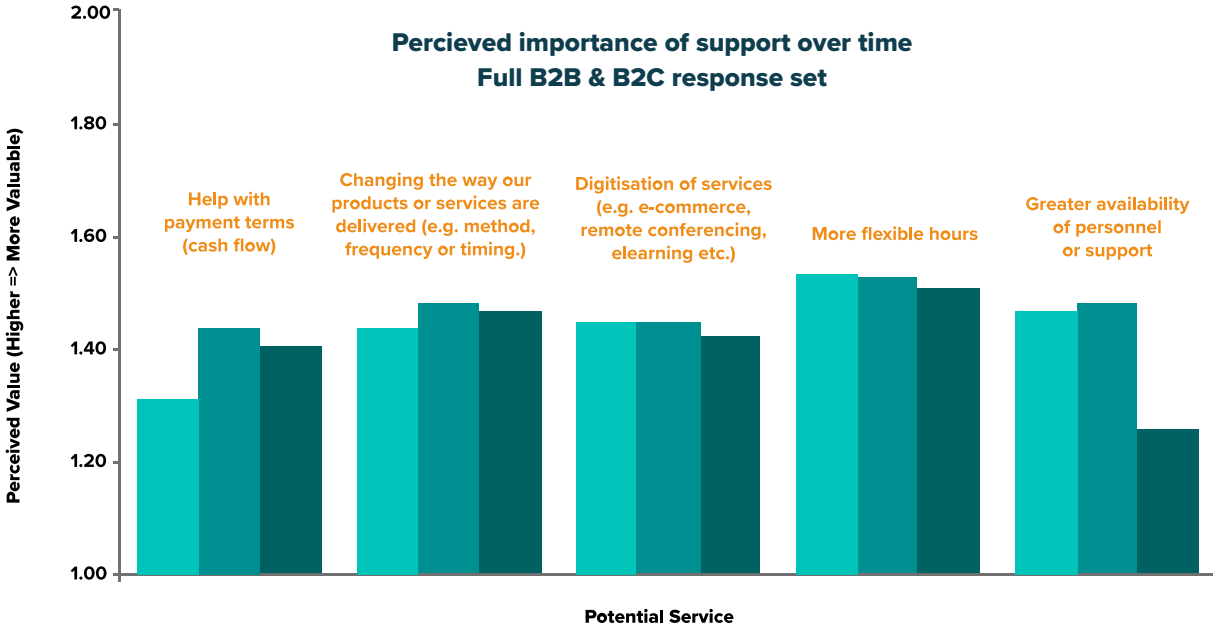
The most significant way in which organisations can help their stakeholders is to stay economically active - especially in the very short term - though even in 6 months this was seen as important. The public seems to be genuinely grateful for the effort that organisations put into keeping their services going. This is emphatically the case for B2B services and products; "we need you to keep going!" is the message. The next most important was the provision of flexible hours followed in almost equal scores by changing the way services could be delivered and digitisation of services.





"More rollout of simplified products/ low use subscriptions for new or social users."

It is significant in a survey of this size that no suggested service support was considered any less than 'between somewhat' and 'very useful' to businesses and consumers, supporters and service users as we would have expected, for at least some groups, a proportion of cynicism or self reliance. There is also a correlation between respondents scoring highly on how they could be helped, and having a high need for services. This has significant implications for building loyalty with the correct product and service development approach. This point is explored in another macro insight.



Guidance and policy leadership are seen as useful in the short term tailing off over six months by which time we are assuming people are expecting new behaviours will be established. The reality may be that there will still be contracting policies across national and even regional boundaries which may make this a longer term requirement. Help with payment terms and cash flow increase in importance over time, though this is not the highest scoring category.

Whilst it is for all organisations to analyse their own data, it does appear at a macro level that what people are looking for is an alignment of organisations with their own lives. Different hours, new services and digitisation are likely to be a reflection of the mass-public behaviour change with work from home, home-schooling, fewer travel miles, more local purchases and other COVID-19 lockdown and health related considerations. This request for flexibility may be challenged in the short term as firms scramble for recovery, asking for longer hours and more commitment from staff. It is possible this will have a higher negative impact on staff wellbeing than would have been the case before lockdown.

"Publicity and transparency about measures for COVID-19 and other emergencies. Incentives or offers to encourage me and others to return to venues. Possible partnerships with local charities, environmental or community projects to show support for the vulnerable."

There are many ways you can help me get through this, and money is not the main one.

MAKE MY DAY-TO-DAY SERVICES EASY TO USE

| KEY THOUGHT

As we live and work in a less-physical, more-virtual world, the need to make products and services tech-capable is ever more crucial. The pandemic has accelerated people's expectations of being able to carry out their daily tasks via technology - these innovations are essential, particularly in a lockdown world.

A sector that clearly reflects and demonstrates the need for this insight is financial services, so these findings are concentrated on advice in that arena; however, take note, the lessons here are relevant to all areas of society.

The group of respondents selected for their use of banking, insurance and savings services is a group that indexes similarly to the UK adult population, though slightly more affluent. So measuring against the norm there are typically only marginal differences - though we did see a significant difference in expectation of digitisation of services.

Of the results where there were interesting differences, those working in the Financial Services Sector were slightly more downbeat than other sectors, marking themselves 3% more in the Catastrophic Change category than average (38% compared to 35% overall).

Whilst the downturn has been triggered by a health crisis and not directly by the Financial Sector (unlike 1991 and 2008), clearly the economic impact of lockdown is a major financial one, so perhaps the surprising thing is that the Financial Services Sector respondents are not more in the Catastrophic Change category.

However, the respondents are more polarised about the medium term outlook for their own personal prospects. Whilst there is 7% growth in those feeling optimistic about themselves after 3 months (39%, up from 32%), there is also a 5% increase in those In Catastrophic Change over the same period (26%, up from 21%).

This balances back out somewhat after 6 months (with 34% optimistic and just 20% catastrophic), but this does suggest that those in Financial Services are noticeably more likely to be either strongly upbeat about their situation, or very negative than those in other sectors.

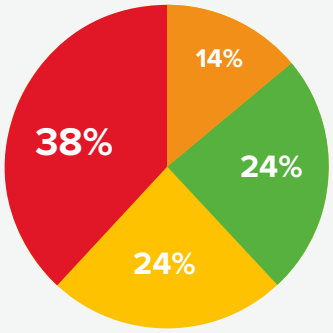
Despite this, the Financial Services respondents generally get more positive about the prospects for their service providers over time. Whilst 64% currently believe their providers are In Catastrophic Change right now, this falls to just 49% after 6 months. However, this is still more negative than other sectors' attitudes towards organisations, who believe 41% will be In Catastrophic Change after 6 months.

One clear divergence from the norm for this group and that is to do with where financial services users are looking for support to lessen COVID-19 impact.

65% of the Financial Services respondent group said digitisation of services would be very or extremely helpful, compared to 47% for all other sectors.

These scores fell slightly over time, but remained proportionately similar when respondents thought about the support they would like in six months time (59% vs 44%). It is feasible that this opinion was already in existence pre COVID-19, and the pandemic has underlined the expectation that services that form part of day-to-day life should be easy to use and accessible. It is likely that the emergence of the new transforming financial services player such as Monzo, Starling and Tide in the UK are gradually creating a momentum that needs the major insurers, bankers and lenders to follow. It may be that Financial Services, as a regulated industry, has had to innovate at perhaps a slower pace than other sectors, but now such innovations are essential in the lockdown environment.

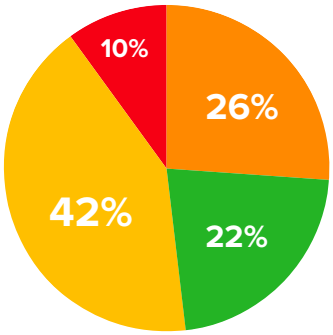
Macro CVII categories
B2C Financial Services Sector



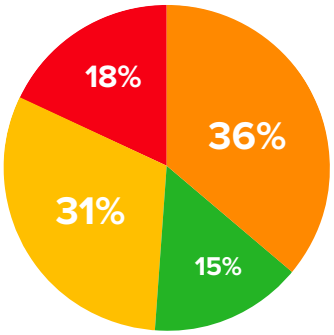
- In Catastrophic Change
- Hopeful in Hardship
- Surviving but Despondent
- Managing and Optimistic

Interest in digitisation of services

- Not helpful
- Somewhat helpful
- Very helpful
- Extremely helpful



Financial Services respondents (3 months)



All other sectors respondents (3 months)

There seems to be a clear requirement for many players in the Financial Services Sector to transform their digital journey. But COVID-19, like in so many areas, has accentuated the leaders in this space, and, overall, the results of the survey indicate that the Financial Services Sector needs more help than others; with continued or intermittent disruption still likely for some time, the next 6-12 months is a clear period for Financial Services to progress digital innovation and transformation.

WORKFORCE MANAGEMENT

Every organisation, from small to large, will have experienced considerable change since the outbreak of the pandemic (BBC, 2020) and the people that work for those organisations are at the heart of successful change. But of course, they are also people, so they also change. If organisations and their leaders can work towards policies that lead their workforce to success, then bringing about innovation and communication, and therefore the motivation to change, should be smoother.

GUIDANCE

Dealing with the impact of persistent and widespread behaviour change is not just about revenue, targets, and productivity, though these will need review, it's also about how organisational culture and people-based practice evolves to respond to changing expectations at home, work and play.

The organisations that transition successfully into 2021 will be those that are flexible and responsive to their teams' new needs. This may be harder for large businesses to take on board, yet they may be able to learn from smaller organisations that spend time focusing on their employees. For once, it might be time to 'be big but act small'.

Businesses can do this in a number of ways. In particular, now is the time to introduce technology and support to underpin hybrid home-office-working. And related to that, flexibility and understanding is paramount. This might mean flexibility in hours, or conditions, or striving to remove a culture of presenteeism, but it could also point to the advantages to be gained from supporting a permanent workforce and the business' future as a whole, by employing short-term, expert-focused contracted associates.

Additionally, attitudes to commuting are clearly changing dramatically and it may be appropriate for organisations to discourage peak time and encourage active travel methods, changing working practices and infrastructure accordingly and communicating the impact of these changes to customers and service users. The new workplace is no longer a physical place for a definite set of people; it will be a virtual experience for a range of people invested in a business and its future.

EXPERT COMMENTARY

James McQuarrie,
Founder NextFree

The workforce after 2020 will be reviewed very differently. In particular, the logistics of where and how people work is being examined, with the hybrid 'work from anywhere' model not available to all organisations, nor all workers. Further, the freelancer and contract market has been turned on its head. In the space of a few short months, it has transformed into a market of huge oversupply and very low demand. So is now the perfect time for organisations to reassess how they manage a hybrid workforce, not only varied by location but varied by contract type? Elsewhere in this report are many references to new products being developed, and new customer experiences being created. This brings risk to recruitment that can be mitigated by introducing freelancers into workforce planning, with communications platforms such as Slack and Zoom supporting this way of working. It seems that there is a coming together of transformative technology and practices that will lead to a more intelligent, efficient and more wellbeing-focused experience for many workers.

ENTERPRISES AND AGILITY IN THE SAME SENTENCE?

KEY THOUGHT

In communications, organisations, particularly larger ones, should consider thinking beyond the traditional internal comms channels (all staff emails, "town halls") and consider how other media (digital video, remote networking, wellbeing workshops) can both communicate with and support staff. At the same time, creating a feedback or measurement mechanism to see how remote staff are doing, and being able to support in the right way, will be an important new facet in staff wellbeing and CSR activities.

Whilst remaining economically active is important for all types of companies, employees at larger companies are much more interested in flexibility in their relationships at this point.

Two-thirds (67%) of respondents from companies with over 250 employees said they would like more flexible hours to reflect the overall behavioural change instigated by COVID-19, compared to an overall response rate across companies of all sizes of 52%.

"Will hopefully have found new ways to operate safely and maybe found different ways of working that may appeal to more people."

Services interest vs. organisation size

No of employees in company	Help with payment terms	Changing delivery of product or service	Digitisation of services	More flexible hours	Greater availability	Staying economically active	More communication with me	Guidance around social distancing	Specialist communications and digital support	Policy and practice leadershop on behald of the sector
251+	60%	60%	62%	67%	69%	71%	69%	64%	69%	69%
51 - 250	64%	64%	45%	48%	55%	77%	59%	59%	57%	66%
11 to 50	67%	57%	59%	54%	59%	75%	52%	59%	48%	65%
5 to 10	63%	44%	54%	40%	58%	79%	52%	60%	54%	69%
Total	64%	56%	56%	52%	60%	76%	57%	61%	56%	67%

69% of those at the larger companies shared that they would like greater availability of personnel or support (compared to 60% overall) and 69% (compared with 57% overall) said they wanted "more communication with me".

This points to an interesting shift in company culture. Smaller organisations have generally been better able to reflect the needs and ways of working of their staff, including internal communication; this is shown in the smaller proportions of respondents from those companies flagging this as an issue. But now, those in larger businesses are demanding similar levels of flexibility and responsiveness.

This will have significant impacts on society and business, and large organisations will have to adapt the most. But the benefits could be significant. Many businesses, particularly in the information economy, are already realising they can be as efficient, or even more so, working remotely and expenses, and indeed carbon emissions related to travel, can also improve. Businesses should also consider the satisfaction and wellbeing of their teams; for some, remote working will be liberating, for others it will bring more challenges and, with an increase in homeworking it will be important to support those teams.

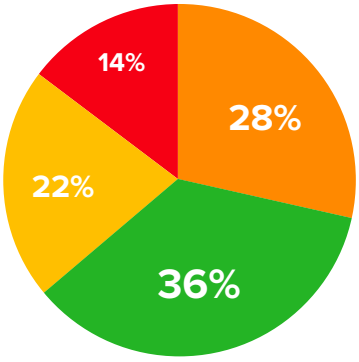
BUILD 'WORK FROM WHEREVER' BUT DON'T ASSUME 'WHEREVER' WORKS FOR EVERYONE.

KEY THOUGHT

This is not just about businesses investing in home office equipment for their staff as a business asset, including infrastructure like broadband, to increase long-term productivity - though that is relevant. Transformed, hybrid working practices with less reliance upon standard offices, new COVID-secure procedures around shared space areas, standard four day week contracts and 'off-peak' organisations that manage their staff travel outside of peak travel hours all provide opportunities for significant change. Transformation is likely to be to a hybrid working environment. Innovative organisations with explicit wellbeing strategies will attract the most productive staff.

35% of people answered that their work load has not been affected by recent events, and a further 28% said they have significant capacity, meaning that much of the media focus has rightly been on how well many people have adapted to the working from home experiment.

Can I still do my job?



- No capacity at all
- Partial capacity
- Significant capacity
- Full capacity

However, 22% said they had only some capacity for work, and 14% said they had no capacity for work/study. Whilst much of this latter group may relate to furloughed staff, and so will bounce back once businesses come back, this won't apply to all of this group, and indicates that some businesses may have challenges with how some of their staff can work optimally from home.

"I'm still working full time but home-schooling kids is a pain, hopefully I will be able to go into the office a few days to break the week up."

Whilst supporting home office conditions may be seen by some bosses and company leaders as not their concern, with the drive towards greater flexible working on the back of COVID-19, ensuring productivity from key staff, wherever they may be, should be considered a key success factor, especially if there is an opportunity to reduce fixed overheads from office rentals.

"Services likely to get back to normal once staff return to work or more effective home working solutions are found."

This point is emphasised by the fact that households shared by adults (typically but not exclusively how younger workers live) have the lowest percentage of full capacity working of all household types at 29%. It is therefore the youngest generation of current workers – the future of the company workforce - who are most greatly impacted in terms of productivity.

COVID-19 has affected workloads and effectiveness unevenly across the workforce. Forward-thinking business leaders should therefore consider ways in which to facilitate effective home office environments for all employees, in terms of age group and living scenarios, to get the most out of their staff, and to maintain staff satisfaction and retention; this is particularly relevant for millennials, who are less likely to be loyal to a company, especially if they don't meet their emotional needs.

'WORKING MORE HOURS FROM HOME THAN EMPLOYED FOR [caps from verbatim]'

Companies could be facing a period of "work inequality" between the "home office" haves and have-nots.

BUSINESS TO BUSINESS: DOES CHANGE BRING THE CHANCE TO SHINE?

KEY THOUGHT

Contractors and freelancers may be reeling from 2020, but the organisations that employ them want them to survive. These sectors should seize the day and use their skills to support their customer businesses through transformations in product, digital footprint, process, remote working and strategy.

NEXTFREE

Written by guest contributor

James McQuarrie,
Founder

nextfree.co.uk

This year has been tough for most people.

In particular, 2020 has been a difficult year for the B2B market in the UK and specifically independent consultants, contractors and freelancers, because COVID-19 is just one of many challenges faced by the sector.

First there was the uncertainty caused by a general election in the UK at the end of 2019 and by Brexit early in 2020. Our members at nextfree.co.uk saw a slowdown in demand over the period greater than the normal “holiday season” effect.

Next, there was confusion and, in some sectors, massive market disruption, due to the expected enforcement of IR35 reforms in April (the reforms were postponed until April 2021 due to COVID-19). Big institutions placed blanket bans on engaging contractors and terminated most of the contracts they’d already agreed, effectively flooding the market with available expertise for the first time in many years.

Finally, the problems were compounded in March by the global pandemic and associated lockdowns around the world, causing a massive drop in demand for contractors, freelancers and consultants across the board, and across borders. Many businesses faced with uncertain futures also dropped their interim workforce as the first of their cost cutting measures.

In short, 2020 has turned the contract and freelance market on its head. For well over a decade, the market had been unevenly balanced with far more demand than supply could meet. But in the space of a few short months, it has transformed into a market of huge over supply and very low demand.

THE CHANGES

The data gathered by the COVID-19 Impact Indicator study reflects two key changes that the market would expect to experience.

Most independent professionals are uncertain about their future.

Those who had the foresight to plan for the worse (something anyone working for themselves should be doing) will be able to ride things out and support themselves and their families in the short to medium term. But even they are uncertain about their longer term prospects given that no-one can predict when, indeed if, things may return to "normal".

Those who didn't plan, or were at the start of their journey running and building their own businesses are in more dire straits. But, there is a thread of hope running through our findings...

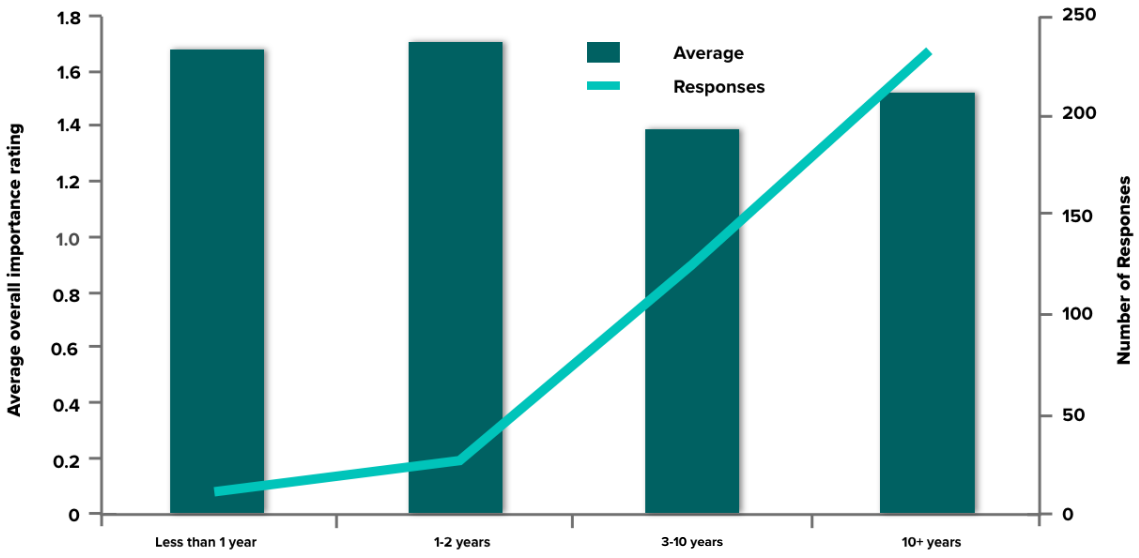
For those who have kept their businesses going through the upheaval, there are opportunities on the horizon.

Why? As more and more people come to terms with how to live day-to-day with the crisis and businesses that have survived start to feel more confident in their own longevity, there will be a growing demand for doing things differently. This survey shows that people want the organisations that they work with to transform as a result of the pandemic, and not just survive. They are demanding change.

"Expecting financial situation to be clearer by end of financial year, though still tight. Expecting as an organisation to be working very differently which offers well being opportunities to staff."

From B2B consolidated survey:
'Impact on you in 6 months'
CVII category - Managing and Optimistic

How long has this organisation, in its current set-up, been in existence?



So with change and transformation comes a need for expert support. Whether it be in relation to developing and implementing new business processes, digital transformation, new product development, or help entering new markets and serving new customer segments, there will be many new B2B opportunities.

For those who can align the services they offer to meet this new demand for expertise, there could be light at the end of the tunnel. Although only 20% of surveyed organisations have existed for 2 years or less, they have around 20% more enthusiasm for support for new and extended services to deal with the pandemic. This could be influenced by a combination of capability/ resources but also about attitude to change.

THE OPPORTUNITES

As business confidence returns we believe there are four immediate areas of opportunity for companies that offer B2B services. We also suggest three additional areas B2B service providers could explore as emerging opportunities too.

IMMEDIATE OPPORTUNITIES

- Digital Transformation
- Support the thriving
- Helping organisations to mitigate risk
- Wake and support the sleeping giants

Digital Transformation

Few, if any, organisations can now consider "digital channels" as optional extras that they should explore. The lockdown has shown how a coherent digital presence and strategy is now critical to all organisations. Organisations that have survived by expanding their digital presence (or establishing one) will need help improving those new offerings. Organisations that haven't previously had a digital presence will need to catch up, quickly.

Support the thriving

Organisations that have thrived during lockdown will need to find ways of maintaining their newly expanded audience and building on the opportunities it presents them with. They may need help with designing and implementing new business processes, rationalising and optimising newly developed offerings or simply support in the form of an extra pair of hands or two to help deal with demand. Getting that help and support from service providers will buy them the time they need to work out what a new normal looks like and what they need to support their continued growth.

"Hopefully our business will be bigger and better than ever in the local area due to our work during the pandemic."

From B2B consolidated survey:
'Impact on you in 6 months'
CVII category - Managing and Optimistic

Helping organisations to mitigate risk

Organisations that are still shaken by recent events, but know they need to take action now or risk being even more badly affected over the coming months will be looking for support. Helping these organisations work through what they need to do to meet the changing demands of their customers will offer multiple opportunities to sure up businesses that could then become longer term clients.

"Big opportunity to enable our customer digital modernisation going forward."

From B2B consolidated survey:
'Impact on you in 6 months'
CVII category - Managing and Optimistic

Wake and support the sleeping giants

Organisations that have been on pause while they waited out the crisis will need to start projects up again and at speed to catch up with missed deadlines and milestones. Engaging third party expertise will offer a quick way of increasing capacity in the short term to make up those gains.

MEDIUM TO LONG TERM OPPORTUNITIES

There is a growing consensus in many sectors that our collective experiences this year will be a catalyst for more substantial long term changes in working practices.

If companies are to thrive in this evolving and uncertain world, they will need a more flexible approach to where and when their teams work.

- **The accelerated switch to project based work**
- **Teach organisations to work remotely**
- **New tools, products and services to support remote working**

The accelerated switch to project based work

In the face of uncertainty a flexible workforce is highly attractive to any organisation. Being able to engage people on short term projects, with definable outcomes, as and when they are needed becomes a competitive advantage. Contractors and Freelancers are well placed to take advantage of this need.

Teach organisations to work remotely

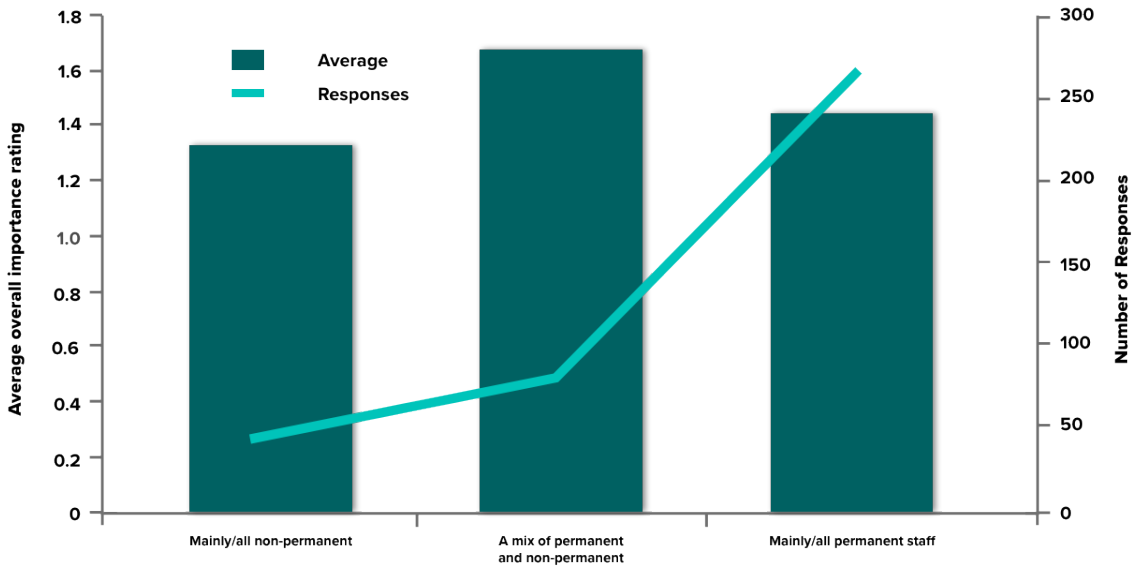
Thinking outside of the immediate needs, there will also be opportunities for people who are experienced at working remotely and on short term, outcome based engagements to help coach, educate and train other businesses and their teams about how to work in this way.

As more and more organisations realise that remote working is not likely to be a temporary thing for a lot of their workforce, and employees start requesting a more blended, flexible approach to where and when they work, many organisations will need to rethink how they operate.

"Relief that some movement/ socialising/exercise can hopefully occur more frequently; lockdown habits hopefully sustained (e.g. family walks, cycling more, on-line workouts) and income coming back more rapidly (e.g. classes, swimming, gym, kids activities)."

From leisure organisation:
'Impact on you in 6 months'
CVII category - Managing and Optimistic

How long has this organisation, in its current set-up, been in existence?



Organisations that have a mix of permanent and non-permanent employees are 25% more likely to want assistance from new services than mostly non-permanent and almost 20% more likely to want assistance from new services than mainly permanently staffed organisations. (This is taken from our B2B consolidated survey data).

Learning from those who have been working that way for years would be a good place to start that transition.

New tools, products and services to support remote working

Building on that thought, there could be opportunities for new tools, products and services to support a wider adoption of flexible working too. This could create a demand for new greenfield projects within bigger organisations to design and develop new software and applications to support their workforces. Zoom, Slack, Teams, etc are all great, but won't be enough for some organisations.

B2B service providers who can help design, develop and deliver these types of tools and products should be seeking out these opportunities in the coming months.

"If social distancing remains the work of the team will be significantly reduced in a physical environment, there are opportunities to develop projects but am nervous about what changes will come with funding."

From B2B consolidated survey:
'Impact on you in 6 months'
CVII category - In Catastrophic Change

While we do not want to downplay the huge negative impact the last few months has had on people, families and businesses across the world, we are optimistic about the future of the contract and freelance market and the wider B2B market more generally.

If you operate in this space, hang in there. With big changes come big opportunities. And the great news is that small and medium sized companies are best placed to quickly adapt and make the most of those opportunities.

POLICY AND PRACTICE DEVELOPMENT

The research shows that organisations need to ensure they have a COVID-19 strategy and that practices are in place to manage change in the wake of developments. An organisation underpinned by these factors will inevitably support people's motivation to change, but also their opportunity.

GUIDANCE

As previously noted in this report, people want organisations to change and will stick with them if they do. Having a policy of responding and pivoting in the face of change will be vital. It's important to align with customer's ever-changing lives, and help them to understand that the organisation's strategy keeps pace with their values and needs (Barnett, 2020). They don't want to go back to 'how it was', they want organisations to move forward, because nothing will ever be the same again.

Those organisations that can create a clear and believable transformation plan could see their customers look to them to help with managing their own personal progress and change. This puts businesses in the driving seat of the relationship, while maintaining a two-way support mechanism. But that recovery plan must be believable and something that can be executed - organisations must walk-the-walk not just talk-the-talk.

EXPERT COMMENTARY

Owen Hathaway,
Assistant Director of Insights, Sport Wales

"Removing the norms for how you judge investment prioritisation has specific challenges. Traditionally organisations have tended to rely on governance and established principles. KPIs and a history of performance to give grant awarding bodies like ours the confidence and trust to make critical decisions. As an organisation Sport Wales has moved away from this approach through our new strategy, and are far more focused on accountability which is based on a safe to fail environment and being learning led.

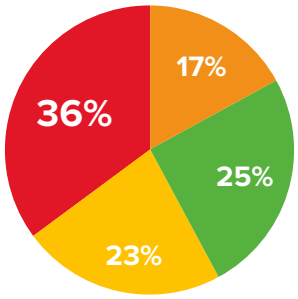
With COVID-19 the entire approach of the sector had to shift. We have brought as much intelligence into our core Insights team as we could to help with our prioritisation, but it was instructional for us to hear that respondents may have taken a view that we were in a challenging position, but they were also clear where they wanted to support change and evolution.

When we first engaged with the COVID-19 Impact Study, we were looking at a one off exercise to derive insight for us and our member organisations. It is fair to say that the longitudinal nature of the study could now be of great assistance in helping an organisation with the challenge of creating policy."

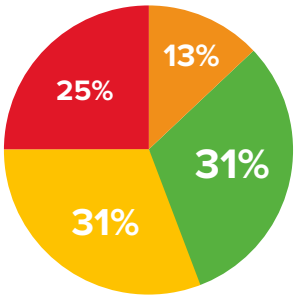
IT'S NOT ABOUT RECOVERY, I WANT CHANGE

KEY THOUGHT

In macro community and policy planning, supportable and believable recovery plans can be matched with public expectation and personal mitigation. A strong community approach may be able to bring organisations and individuals closer together. But the trust bond may well be a tenuous one.



B2B respondents



B2C respondents

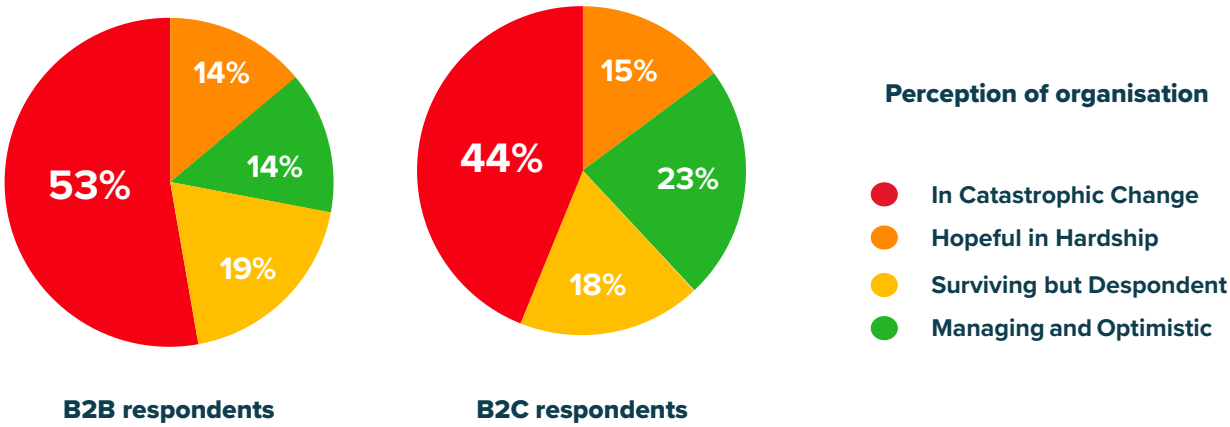
Self Perception

- In Catastrophic Change
- Hopeful in Hardship
- Surviving but Despondent
- Managing and Optimistic

It seems that individuals think they have been impacted less than organisations. Responding for themselves, 25% of people felt they were In Catastrophic Change. However, when people responded as part of a business that they are employed by or involved with, this number moved up to 35%. Many more individuals also think they are surviving economically but feel their wellbeing is compromised at 31%, compared with 23%. Looking at the positive thinking population, 31% of consumers are optimistic and feel like they are managing, but only 25% of individuals representing organisations think the same.

This principle is exaggerated further when individuals are asked to apply the Coronavirus Impact Indicator Scale to organisations that they interact with, with 44% of B2C respondents seeing the organisation In Catastrophic Change and over half (52%) of all B2B respondents thinking their business partner is In Catastrophic Change.

If organisations can create a clear and believable transformation plan, it should be possible to persuade a significant number of their stakeholders to have a more positive view of their future and also see them as a part of their own personal recovery.



This has significant implications and also opportunities for businesses in recovery planning. At a high level individuals may be able to take mitigating actions to manage their own lives, but are unable to apply the same analysis to organisations they work with, buy from, support or utilize services.

This also aligns with the data telling us that the respondents who place more reliance upon those organisations are more likely to think they can be helped by them through changing services and communications.

"More businesses will have been lost, particularly in the Hospitality, Retail and Travel Sector; people will still feel unsure/unsafe about shopping/travel/dining/entertainment in public enclosed spaces so I don't see things improving much. This will begin to be a time of re-evaluation and re-jigging."

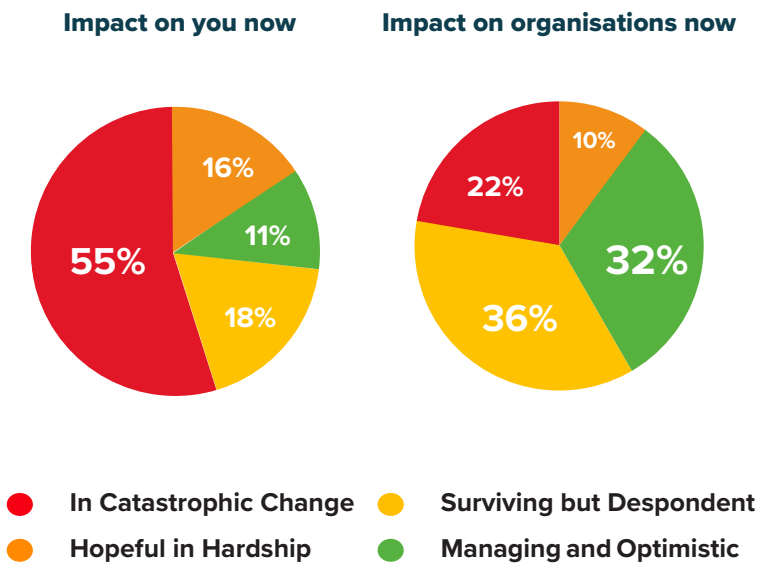
I can manage for now but I expect a lot of organisations to fail.

THE NECESSITIES WE JUST FORGOT WE NEEDED

KEY THOUGHT

At a time of massive challenge for Public Sector bodies, soon to be followed with an economic crunch on funds, there seems to be a realisation from the public that what they may have taken for granted is more valuable than they thought. Whist there is significant concern for the welfare of service providers, there is an opportunity to build on a well of goodwill. Now may be the time for Public Sector bodies to try new services and innovations on a receptive user base. They will value transformation plans and recognise the economic and wellbeing pressures that require new behaviours, and value judgements, on all sides.

Respondents to this group, users of public services, had the greatest concern for the welfare of the organisations contacting them. There was also the starkest contrast in this group between those In Catastrophic Change versus Managing and Optimistic. This presents a complex set of issues for public bodies to deal with.



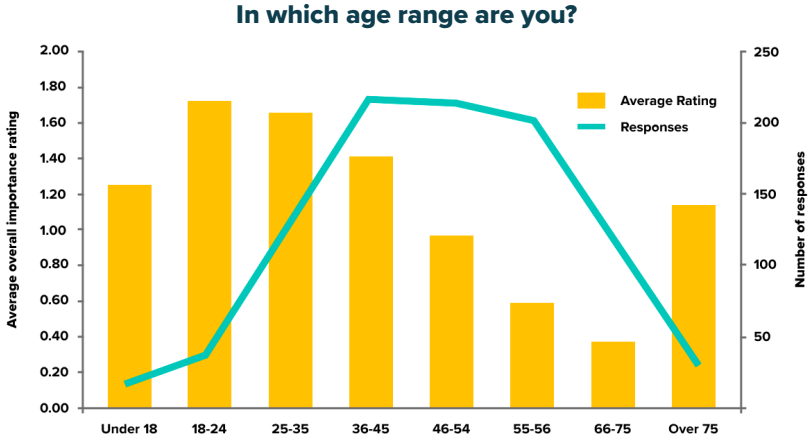
"I feel that if nothing changes and still no return to training or play you'll see a negative impact on the sport which was gaining huge momentum. I hope the local NGOs are not lost as they bring in such value to the game in our regions they are the face of Welsh Netball for the community."

It is clear that service users are pessimistic about their future. But the broad sentiment is empathy, not criticism. This has implications that a strong trust-based relationship can be built with the Public Sector that has arguably not existed for some time in some communities. There is a sense of being in this together. If service providers are transparent with their transformation plans, it seems feasible for there to be a 'new public services deal' based on new behaviours on both sides. The equation between cost, value and service level is better understood. The whole attitude towards the NHS may well have had an impact upon this.

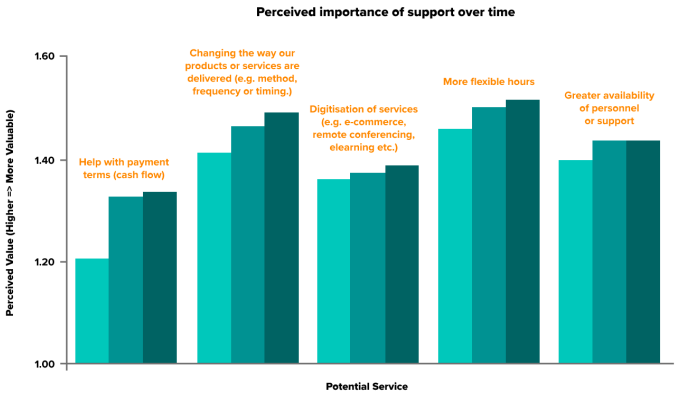
**"The longer leisure centres and activities remain closed the more significant the economic loss.
This may have further impacts on staff and community well being especially in terms of employment costs redundancy etc."**

Those who need the services most are those who have been most impacted by the pandemic and who have the most need for a changed set of services. There may be an opportunity to close the inequality gap in some communities by focusing on a resetting of service delivery that builds more resilience into the system.

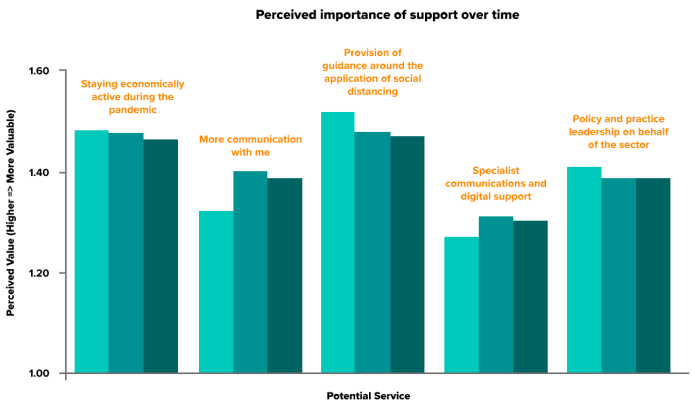
There is also a noticeable index towards those in education and younger people who are asking for more in terms of changed services and a significantly higher index than other respondent groups in terms of viewing the ability of public services bodies to improve the wellbeing outlook for individuals.



This is influenced by the number of leisure and sports organisations in the survey which have been most impacted and are now striving to transform their delivery to bring their members and users back into their facilities.



"People's attitudes have changed, however a small majority still want their life, no matter the cost to others. The Public Sector are having to still deal with everyday normal things as well as this nightmare. I think they have done the best they could and we will all work our way out of it."



There are a significant number In Catastrophic Change who see little hope and have lower expectations of being helped. These are likely to be those for whom the community seems less interested. Further exploration of this potentially 'left-behind' group will be critical to ensure that if a transformation programme is put underway, it does not widen the gap and leave these people even more marginalised.

The Public Sector - hit hard but with a well of sympathy and support.

THE FUTURE

The journey so far

The introduction to this report outlined our methodology and approach and the articles developed across intervention themes are intended to contribute to an assessment of how changing behaviours can be understood by organisations to assist with decision making on investment and resource prioritisation.

When we first launched and promoted the study, we were focused on a single dipstick study, albeit with a very robust data sample and a unique ability to combine qualitative and quantitative data. We are now very clear on a two year investment with five core cycles of surveys from an independent panel of data, supplemented by always-on participating organisation surveys with up to two every 12 months until May 2022.

As of November 2020, we have some very different contextual data from May 2020 when the first cycle was in field. Very few countries worldwide can claim to have successfully neutralised the impact of the pandemic. Those that have been most successful such as New Zealand in managing direct health impacts have still suffered significantly from an economic and arguable wellbeing perspective.

China and Taiwan would claim to have been most successful overall when compared to population levels and economic impact.

Excluding these outliers, however, we have seen at least two waves of the virus across continents. There is some argument that the US is now seeing a 3rd wave.
As this report goes to print, there is very positive news of at least one and possibly two vaccines, but countered with some sceptical questions about take up.

In the UK alone we have Wales just out of lockdown, England and Northern Ireland now in it, and Scotland with a tiered system. The attitude to communications across the devolved governments has varied significantly, as it does across the world, with even close Scandinavian neighbours Sweden and Denmark having fundamental differences in their strategies.

We also now have a US President-elect already announcing a fundamental change in the approach to dealing with COVID-19. pandemic throughout most of 2021.

It is clear that there are very few scenarios that do not see health services and critical industries continuing to be impacted by the pandemic throughout most of 2021.

What seems equally clear is that a debate about a balance between economic status and wellbeing is now embedded in day-to-day conversations, agnostic to social class or geography. We believe strongly that our Coronavirus Impact Indicator scale, tracking wellbeing and economic impact can contribute to this debate, as well as bringing practical intervention insights to organisations.

Our vision for the study

Our vision remains the same - to contribute to the ability of Private and Public Sector organisations to respond effectively to the impact of the pandemic. The themes we have used to describe potential interventions have been developed as a consequence of the respondent data from the study. They reflect what people and businesses are asking for and it is down to organisations to apply them to their own circumstances and build trust between themselves and their own customer or service user base.

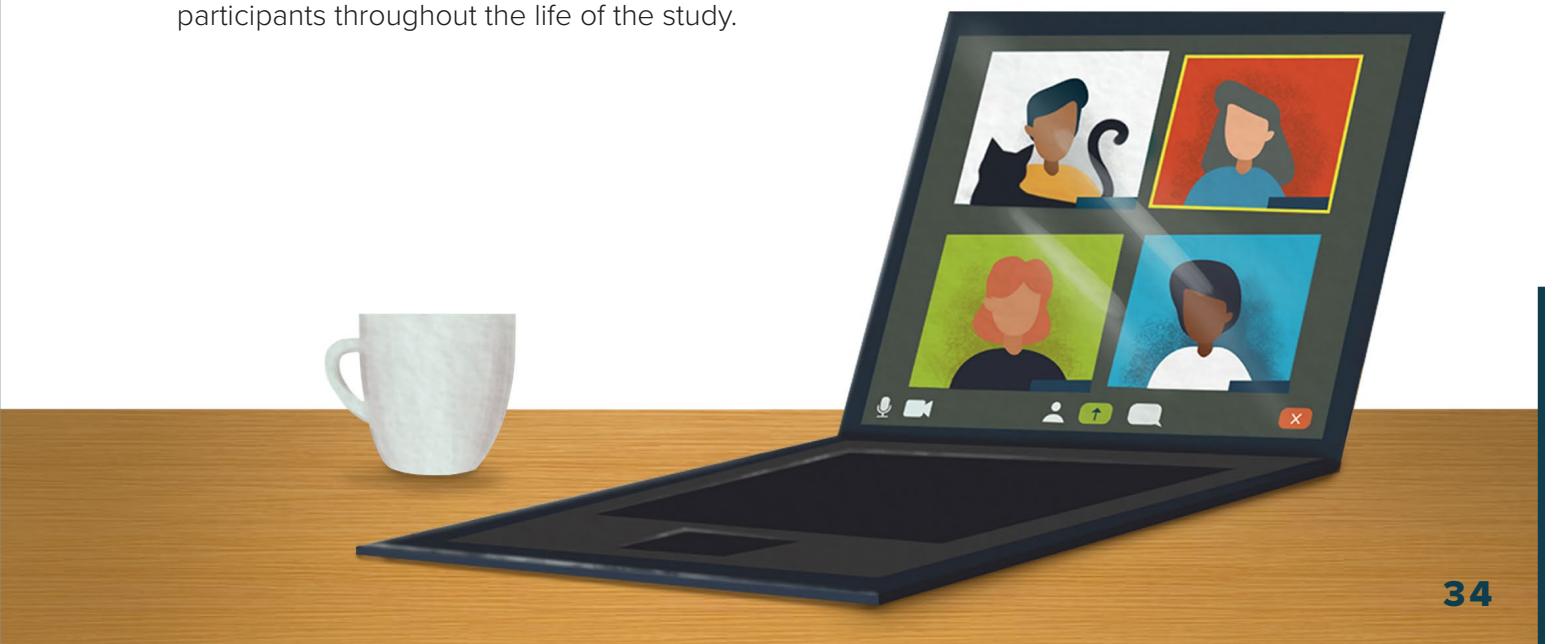
They also range from internal focus around policy and workforce planning to a very external focus around new product development and communications. We have singled out digital transformation as a specific operational capability but even without the specific feedback of our study, there is a clear movement towards the increased application of the internet to our daily lives. Organisations across sectors are being expected to meet that challenge in ways that make lives better.

We have made a couple of key changes to the study since its inception. We will move participation to an always-on option which means we can drop a new organisation survey into the study at any point, and not just in the base cycles. This will allow for more flexibility, more engagement and a more transparent approach to the longitudinal nature of the study. We will have a subscription model to support this change and introduce an always-on insight hub that will be accessible to all participants throughout the life of the study.

We have also extended the sectors in the independent panel research to increase both robustness and relevance to participating organisations. This will provide the core data pillar throughout the life of the survey.

We have determined the end of the study to be May 2022. This is absolutely not a prediction of the life of the pandemic, but it does represent a view that over the two year period, behaviour changes will have had time to embed or return and there will be some form of vaccination available to which most geographies would be expected to have access.

Organisations can then have a two year, five time point study against which to judge future investment and resource prioritisation plans.



What we don't know?

This study can only report the data that is contained within the surveys. We can extrapolate some of the insights against other surveys or policy making trends but there are a number of unknowns that we have to respect.

Vaccines.

We cannot predict either access to or response to vaccines over the length of the study. In terms of behaviour change this could have a dramatic effect. Our current thinking is that whatever 'vaccination behaviour' emerges, it will not settle into stable applications until 2022.

Old muscle memory.

Whilst we can see that respondents typically are not expecting to return to previous behaviours, we do not yet have the data to support how that plays out. We do not know how elastic the muscle memory is to old behaviours when individuals are invited to re-adopt pre-2020 life choices.

What is new?

We have also carefully avoided throughout this report in referring to a 'new normal'. We have done that because we believe this implies a straightforward before and after and our data is telling us that we are experiencing a gradual transition with multiple speeds of change.

Governments.

The massive variation on global national policy will also hang over any conclusions to be made on behaviour change. Whilst it will be mitigated to some extent by geographical natural behaviours, the assumption will remain that governments are capable of influencing behaviour change - whether through active policy or natural mistrust.

In with the new? It's your choice

COVID-19 has clearly been a catalyst for change. It is highly unlikely that all changes will be reversed post-vaccine.

The first cycle in this study is indicating that organisations that have the capability and attitude to adapt to change would seem to be best placed to increase their sustainable performance post-pandemic. They are also more likely to have locked in change behaviours that allow them to respond more flexibly to new customer behaviours.

However, whilst we can paint a stark picture of pre- and post-pandemic and highlight the differences between the new and the old, the reality is that there will be a choice for most organisations. After the transitional frictions of the hard pandemic period gradually ease, a proportion of individuals will be committed to continue making new choices.

This proportion will undoubtedly be more than historic trends would predict. But it will not be a universal 'new' and organisations will have to plot their path between the familiar and the less trodden. There will certainly be challenging questions about access to new services and products.

This study will remain focused on capturing insight to do with the relationship between customers, service users, members and supporters and the organisations they need to live and operate on a day-to-day basis. Over the 24 months of the study we will endeavour to make that insight as applicable and robust as possible, at a policy and practice level, tracking behaviour change over one of the most turbulent periods for wellbeing and economic sustainability in living memory.

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SPECIAL THANKS

This study was conceived as a business community contribution and so would not have existed without the initial contributions and co-investment from our collaborating business and associate network. Whilst there are many people to thank I would specifically like to recognise the contribution of associates Sue Carter and Alison Woolford together with David Ellis, of Station 10, Paul Weallans of Panelbase, Richie Hester of Hester Insights, Dr David Land of Causeway Intelligence and Adam Hopkinson of Halo Media.

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