



fractal

/ CONSUMER MINDSETS IN THE WORLD POST COVID

A COMPILATION OF IMPLICATIONS FOR INDUSTRIES

June & July, 2020

1 Introduction

An outline of the rationale, context and approach taken to develop this perspective document.

Primer

Our Approach

2 Consumer Mindsets

A deep dive into individuals' dominant cognitive and emotion states. And relatedly, likely action tendencies during and after this time.

Tunneling:
Present & Future

Defaulting to
Distrust

Engineering
Adaptability

3 Industry Implications

A sector-wise breakdown of the implications of these mindsets on consumer decision-making; coupled with a provocation to jumpstart conversations around opportunities for businesses.

CPG & Retail

Technology

Media & Telecom

Financial Services

Healthcare

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PRIMER

The notion of survival has changed dramatically since the early days of humankind. Humans have evolved to live **beyond a constant state of fight or flight**. We have developed meaningful mechanisms that help us process as well as respond effectively to sensory and physical threats.

However, the uncertain and unprecedented world that we find ourselves in today has rendered our **'emotional radars'** highly aroused and under-prepared.

The pandemic has created a pervasive and lasting threat, leaving us feeling vulnerable and cognitively drained. The emotions, behaviors and coping mechanisms that best support us through times of heightened distress are therefore brought to the forefront. It is no surprise that this context has triggered a fundamentally **self-preservative** version of us.



SURVIVAL MODE KICKING IN

A PERSPECTIVE DOCUMENT

Behavioral Science & Design led approach

It is impossible to make predictions about what's to come. Thus, this report aims to **build preparedness for businesses** in the Covid-affected world by highlighting the possible-durable consumer mindsets and further, implications with an industry focus.

Written by the Behavioral Sciences & Design team at Fractal, this report takes a **consumer lens** on rapidly shifting trends; these shifts and needs highlight the **physical and psychological experiences** of individuals during and soon after Covid-19.

The way to build preparedness is to leverage the shifting behaviors and design to address **emerging needs for the new normal.**

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Threat Context

The nature of the current threat of COVID-19 can be characterized by the following factors

Looming uncertainty; existing & anticipated

+

Strained resources

Diffused, passive, external

+

Precautions don't assure protection

Lasting, non-episodic

+

Unfamiliar, abstract, unpredictable

Emerging Consumer Mindsets

To breakdown consumer decision-making in this context, it becomes essential to understand the combination of mindsets:

Tunneling: Present & Future

Reduced resources drive a shift from abundance to scarcity as a mindset.

FATIGUED
VULNERABLE
OVERWHELMED

Defaulting to Distrust

Separation increases, driving divisiveness. Personal safety is at risk in all social contexts.

VIGILANT
ISOLATED
SKEPTICAL

Engineering Adaptability

New states of equilibrium are inevitable as humans cannot live in heightened states of stress over time.

APPRECIATIVE
INSECURE
ACCEPTANCE



“ There is a certain amount of anxiety and fear that suddenly creeps through your body, and your heart races just thinking of what the future is going to be ”

1 Tunneling : Present & Future

Scarcity is the feeling of something missing, of resources being less than optimal. The brain focuses attention and primes actions towards optimizing these scarce resource - an effect known as tunneling. When in the 'tunnel', individuals face an inability to process peripheral information even if relevant to them, as it might be irrelevant to the tunnel.

1 : Tunneling

Present & Future



How are individuals feeling?

FATIGUED

Individual goals get rewired to focus on more immediate and outcome oriented decisions

They reduce focus on tasks and activities that don't feel purposeful

They blur out stimuli that feel 'distracting' in an attempt to minimize effort and conserve energy; they are in the pursuit of optimizing all resources

1 : Tunneling

Present & Future



How are individuals feeling?

VULNERABLE

Individuals cannot process a way out of the 'tunnel' and default more to products and services that meet them in the tunnel

Their isolation drives investment in products, services and experiences that provide a sense of near term safety

Once safety is established, they seek avenues to provide a clear sense of progress

1 : Tunneling

Present & Future



How are individuals feeling?

OVERWHELMED

The current context is highly cognitively taxing. Hence, individuals over-allocate resources on tasks that could be relatively unimportant in the bigger picture

They start to set lower expectations for themselves

They seek interactions to mitigate disappointment, and if this disappointment is not managed, over time they could end up with a sustained lower standard for self

“ It's an interesting setting to understand how designated or accepted authority can be wrong. Governments, WHO - all failing in predicting the state of our society. Everything will have a layer of caution from now on.”



2 Defaulting to Distrust

Physical distance drives psychological distance too. As physical interaction is hindered and conflicting opinions prevail, trust-inducing cues will become less available. It becomes harder for consumers to assume positive intent around them and the risk perceived is higher, making them default to distrust across levels of interaction: *person-person, person-state, person-corporate.*

2 : Defaulting to Distrust



How are individuals feeling?

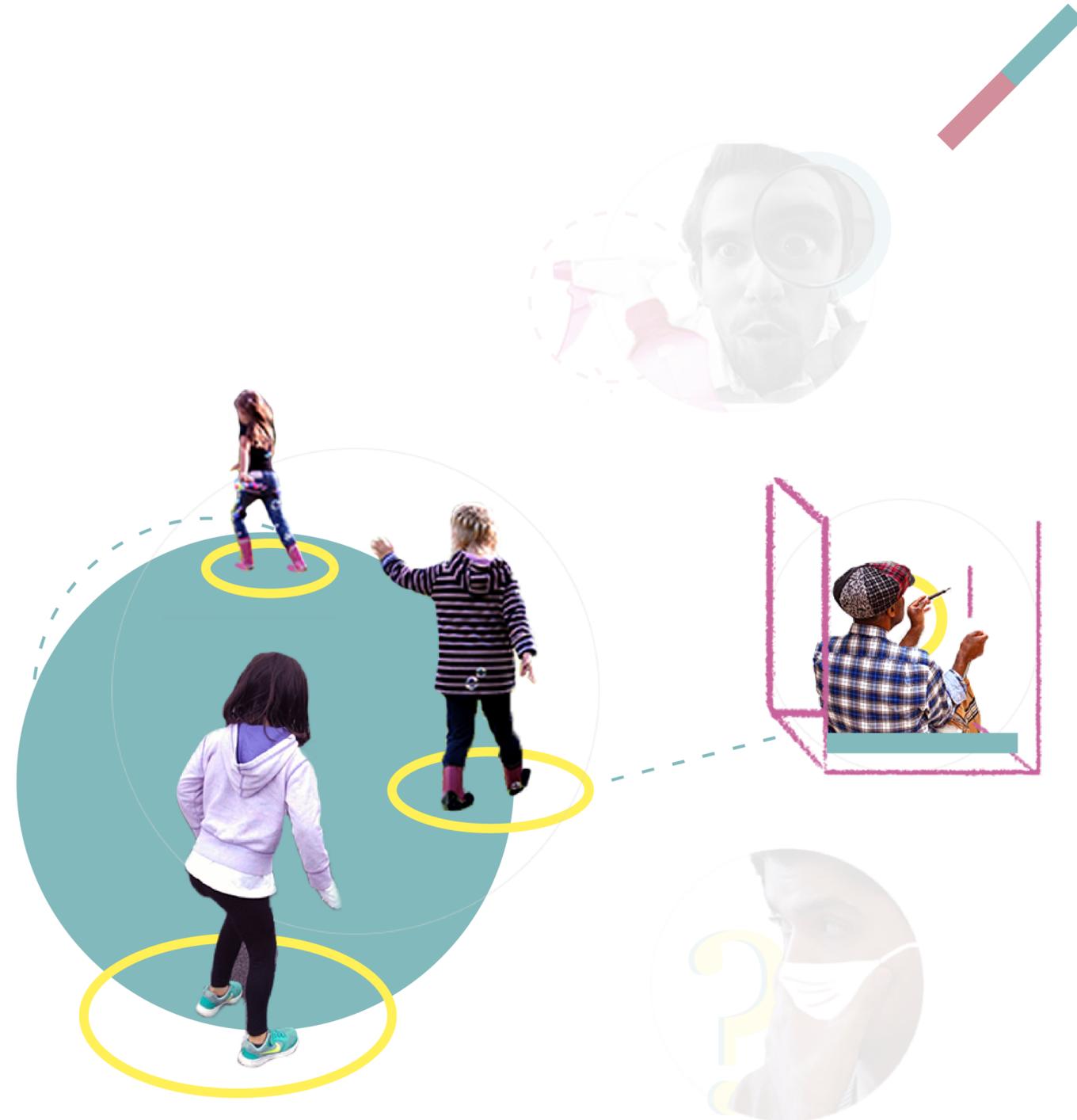
VIGILANT

There is a need for self-initiated information seeking, as despite heightened precautions, uncertainty prevails

Individuals combine information from multiple sources before taking actions in an attempt to gain a sense of control and semblance of predictability

Individuals make efforts to validate personal beliefs and justify their own decision-making

2 : Defaulting to Distrust



How are individuals feeling?

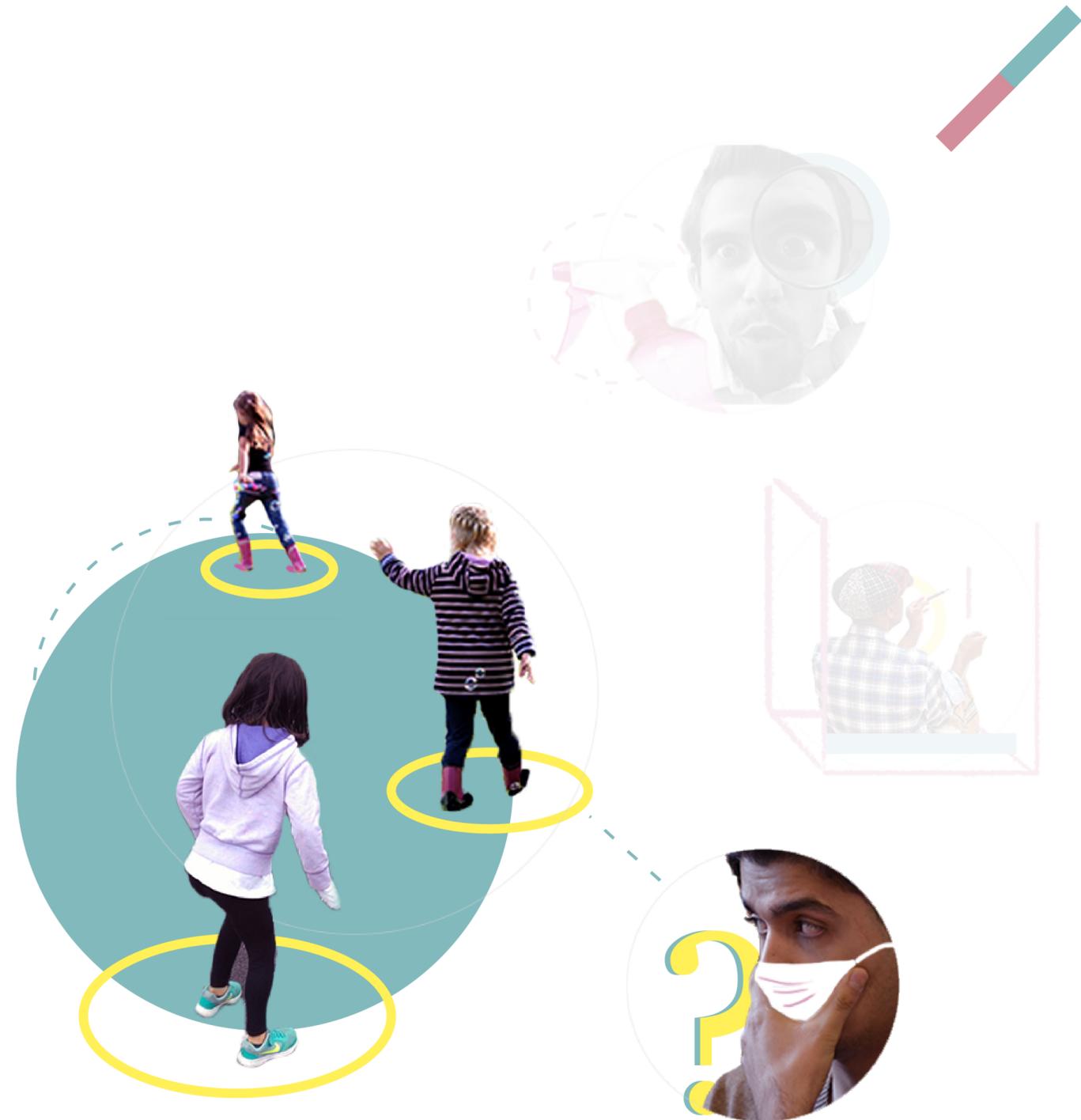
ISOLATED

Loneliness becomes more commonplace, as separation from products, people and places one relied on continues

With no real way to assure protection, individuals are forced to apply new heuristics and cues to evaluate safety

Decision-fatigue stems from constant caution. This will eventually reduce precautions in spaces perceived as 'safe' by the individual (when in reality the threat could still be prevalent)

2 : Defaulting to Distrust



How are individuals feeling?

SKEPTICAL

Individuals grow more conscious of their surroundings, the existing boundaries between self and other grow more defined, and “othering” becomes more common

With lowered visibility into the intent of other’s actions, individuals face an underlying need to attribute blame for the circumstances they find themselves in

New in-groups form, especially based on physical or psychological proximity; social validation from these groups significantly impacts individual decision-making



3 Engineering Adaptability

In the face of dramatic change, consumers are forced to make choices based on access, not preference. The criteria of 'essential' comes into question, and people perceive decisions more from the lens of needs, not wants. The changing world forces adaptation - to new products, services and mediums.

“ I am using digital means to socialize. Looks like this crisis is going to change the way we live life and we should ensure that we don't get into the same rut. This is an opportunity to reinvent, restructure, and relieve oneself of external pressures and expectations ”

3 : Engineering Adaptability



How are individuals feeling?

APPRECIATIVE

Individuals experience a deep empathy and appreciation for the mundane that was invisible or went unnoticed thus far

Individuals start to develop an affinity for what was previously unused / considered sub-par due to mere exposure and repeated usage

New dependencies emerge; there is a higher attachment towards products and services that help the individual 'sail' through these tough times, as emotional and economic utility is felt

3 : Engineering Adaptability



How are individuals feeling?

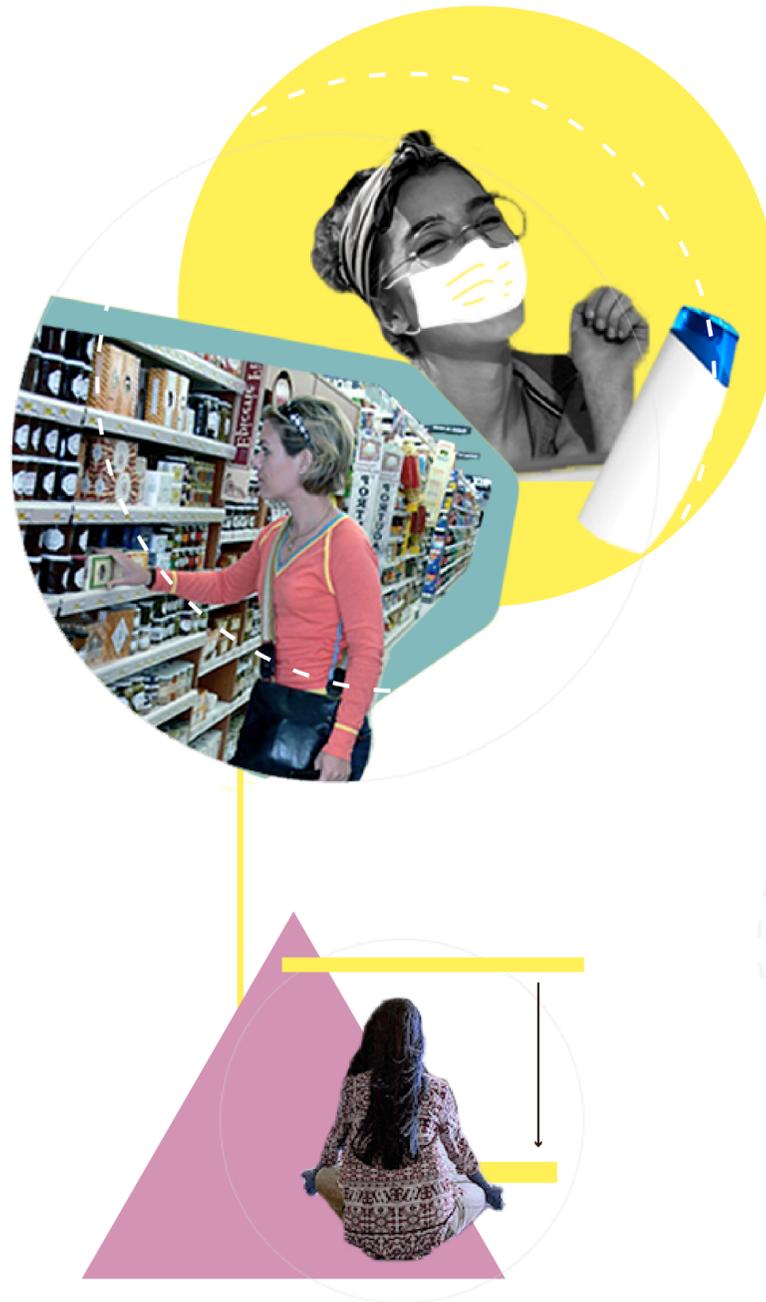
INSECURE

As individuals continue to long for what was accessible earlier, the limited available options are reframed as 'choices' to aid coping with the new reality

Individuals build positive rationales for what they are forced to use

Their choices are disproportionately influenced by social proof from their in-groups due to the lack of cues that would normally influence their decision making

3 : Engineering Adaptability



How are individuals feeling?

ACCEPTANCE

Individuals have a lower capacity and willingness towards discretionary spending; consumers opt for products and services that are positioned as 'life choices' instead of 'lifestyle choices'

Premium in products shift from being luxury-focused to being health-focused

Individuals experience an openness to altering their identity, as they move from discomfort -> resignation -> acceptance. Over time they seek deeper meaning in everyday choices



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CPG & RETAIL

With disruption in supply chains, access drives preference for consumers. Consumers also experience an urgency for their spending to have immediate, gratifying and yet, more lasting benefits.



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1 Diversify & collaborate to survive

Opportunity

Small businesses need to build new moats

Larger brands with deeper pockets grow stronger during downturns. Smaller businesses that are agile enough to find new partnerships to deliver value and to ensure distribution reaches consumers where they are (physically, economically and technologically), are more likely to maintain market share and survive the competitive playground. For smaller local players, informal contracts result in new forms of aggregation and distribution. Digital shopping experiences become inevitable for all.

Provocation

Indie mattress manufacturers who had been struggling to divorce themselves from showrooms go virtual by end of 2020. Who wants to try a mattress that's been touched, sat upon, and slept on, anyway? Online evaluations aided by easy filters of hardness, support, comfort are just the first step. With affordability checks completed, the clincher is a set of 3 freshly sanitised certified mattresses to 'try and buy' right at your doorstep.

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1 Diversify & collaborate to survive

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Adapt to prioritize health

Brands whose core proposition is becoming less relevant in the Covid context must quickly repurpose their products and services towards immediate user needs (eg. sanitation, immunity-boosting, safety, social connectedness). Consumers look to purchase what's convenient, familiar and available with premium-spends on health not luxury.

Provocation

The new version of cases for devices come with a self-sanitizing feature. These come in large in-home sizes (for multiple devices charging and cleansing at once) and also for on-the-go sanitization to avoid even a moment of risk. For a premium, they can also alert you if your fingers are contaminated.

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2 Be big, be small, most of all - be adaptive

Opportunity

Acknowledge that one size doesn't fit all

This is an opportunity for brands as individuals are in the process of finding new defaults. The size, amount and frequency of goods purchased are now increasingly influenced by cultural and political factors. Products and packaging need to be sensitive and adaptive to these micro-levels. Ensuring that packaging accounts for both bulk purchase and individual consumption is essential. Products that showcase longer shelf-life and durability gain preference.

Provocation

The local store's "fresh & lasting" aisle always seems to be the most crowded. Consumers examine boxes carefully to find which products will stay nutritious for a while, in different weather and storage conditions - damage and spoil free. They also balance this with purchasing in optimal quantities and sizes to avoid being 'that' person that gets stares in the store. For bulk buys, online orders are certainly easier and come with less stares.

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3 Be embedded where consumers are immersed

Opportunity

Make digital the primary

Digital isn't a niche channel for engagement, marketing and sales anymore. It's no longer about chasing the hottest trend, trend-setter or social media channel, but instead about the shift to being as digitally native and digitally present as the world of users they're trying to reach.

Provocation

Gamers have started to see dynamic ads in-games. The billboards in the game light up with the latest in-app snack options for the player's avatar, that get delivered on a daily rotation. Buying these unlock loot boxes in the game and vice versa.

TECHNOLOGY

Change in physical infrastructure and lifestyles influence expectations from digital experiences. Technology is seen as the 'savior' to solve for many immediate needs of consumers.



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1 Be the connector for the socially starved

Opportunity

Simulate meaningful shared experiences

Design for not just personal but curated shared experiences that simulate mass environments. Individuals seek to be 'seen' even in collective digital interactions and thus look for spaces that provide the comfort and spontaneity of physical social interactions.

Provocation

It's the 2021 Superbowl, each team has their own local Food & Beverage partner in place. Fans have been in online queues to for over 8 hours to get their curated "Team snack box", to be double sure that they aren't left hanging at half-time as the in-home crowd cam is turned on.

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1 Be the connector for the socially starved

Opportunity

Find the FOMO

When feeling vulnerable and insecure, people seek more belonging and validation from their social counterparts. 'FOMO' becomes more wide and faster spread than ever before. Design to give individuals the feeling of being part of a desirable in-group (eg. invite-only products / exclusive spaces).

Provocation

As things open up, people gear up to jump into the dating circles again. A new dating platform has come up with the 'earth score' that uses peoples' digital traces of the last 3 months to score them on the following parameters: hygiene, altruism, activism and sustainability. Entry and progression through levels of membership rely on maintaining this score.

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2 Set the new benchmark for transparency & responsibility

Opportunity

Have a voice, take a stand

Exploitation of privacy will be frowned upon as individuals remain distrustful. Proactively designing to display high social responsibility and transparency drives differentiation and over-time engagement, as individuals seek platforms that represent their social identity.

Provocation

For the 2020 elections, social media platforms now give users cues to identify content that could be spreading misinformation, hate-speech or prejudice explicitly or implicitly, giving power to the users to further apply that 'filter' when sharing, thus ensuring that outrage doesn't get confused with propagated views.

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3 Match digital literacy with more inclusive features

Opportunity

Curate propositions for never-before users

The mental model of 'tech averse' populations alter. Companies leverage individual adaptability and new-found dependence on technology to drive adoption with new cohorts, markets, potentially for new use cases too. Usability of technology for all is no longer altruistic or nice to have, but a business imperative.

Provocation

It's time for the school exams in December. As parents get back to regular work, the customizable text, audio and visual settings of on-screen content enable grandparents to remote-in to help their grandkids prepare for their upcoming exams, even if they are miles away.

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4 Design to be 'fun'ctional

Opportunity

Be the jack of all trades & master them too

The openness for tech in various novel aspects of life influences how personal time gets allocated to balance mindless, mindful, productive and social time online. User expectations grow disproportionately, as the boundaries between what is realistic and fictional have blurred. While adoption is high during the Covid context, retention depends on the product adequately satisfying a gamut of needs, not just one, or they could become quickly redundant.

Provocation

As new year resolutions are around the corner, a group of employees discuss the DIY skill goals for the next year. The company has great programs, in partnership with many established specialists. Employees no longer have to go out and spend on haircut appointments, or order exquisite desserts for occasions, or even wait around when they have plumbing issues, as over the year they have been incentivized to learn more of these skills. They virtually browse the catalogue for 2021 as celebrations wind down.

MEDIA & TELECOM

A shift in the creation, distribution and fundamental nature of what constitutes quality media will influence consumption choices everywhere. To be relevant in the lives of customers, service providers will have to go beyond connectivity and price differentiation, and in fact become true-to-their-name service providers.



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1 Rethink the human element

Opportunity

Develop alternate ways of content creation and distribution

Growing pervasiveness of technology coupled with limitations in production could lead to a rise of content created and shared like never before. With more 'regular' individuals becoming sensations overnight, and longtime 'celebrities' sharing more of their everyday lives, the lines between audience, collaborator and creator will start to blur. Ownership, monetization and copyright rules will have to be adapt to match the nature of content being created.

Provocation

In memory of the BLM protests of 2020, an automated content creator bot crawls the web to find TikTok videos, public Instagram account saved highlights, tweets and YouTube news clips to switch together a 30 minute piece and is overlaid with the 'documentary template' filters for visual aesthetics, music and further produces a shortlist of voice-over artists that would match the tone of the film.

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1 Rethink the human element

Opportunity

Engineer live audience experiences

Geographical boundaries will now be replaced by technological ones. Real time engagement with content has never been more possible; thus digital cues will have to substitute and compliment the role of physical feedback from audiences to artists / content creators. This will further impact business models, acquisition, booking and slotting of artists. For instance, even embedding ads more seamlessly in programs, in the voice of the curator, as opposed to being a break from it.

Provocation

It's time for the new season of Love is On The Air - the reality dating show that now allows viewers to suggest matches to the participants in real-time; to be the 'eyes' and 'ears' of the participants and help them make the right choice. A two-way chat exists for participants with their viewers. Each viewer has to commit to one participant to 'back' and 'support' for the show once the first episode airs.

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1 Rethink the human element

Opportunity

Harnessing likeness of 'celebrities' for new use-cases

The definition of celebrities will be redefined, a gradual increase of the everyday and mundane will emerge, leaving audiences drawing from vulnerability and 'realness' of artists. The opportunity lies in leveraging these hidden aspects of 'celebrities' and finding use-cases for not just their physical selves, but their voices, personalities and avatars. 'Celebrities' are everywhere now, thus allowing for far more than one channel of reaching them.

Provocation

The next iOS update comes with the exciting promise of customers being able to choose the voice for Siri from a selection of actors, actresses and celebrities that were 2020 audience choice poll. With the functionality of not just setting alarms and scheduling bed time, but also sharing stories to aid relaxation and sleep, the voice of your favourite celebrity speaking to you, will be one ask away.

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2 Be the negotiator for the cognitively overwhelmed

Opportunity

Facilitate easier choice-making for customers in extended avenues

A good telecom service provider becomes synonymous to better functioning life as productivity, leisure and even connection disproportionately rely on it. As consumers spend more time in home and on platforms, telecom service providers become the enabler, the much needed bridge between customers and the many digital services/media platforms they are now forced to evaluate constantly.

Provocation

On activating the 'family service' pack for your household, you receive a home automation start-kit, curated for the size and type of home you have, including smart plugs, sensors, and switches. It also gives you a choice of adding on up to 3 streaming services of your choice, with the same family accounts you have signed up on the pack.

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3 Be present when (and where) no one else can

Opportunity

Ensure seamless service for mental and physical wellness

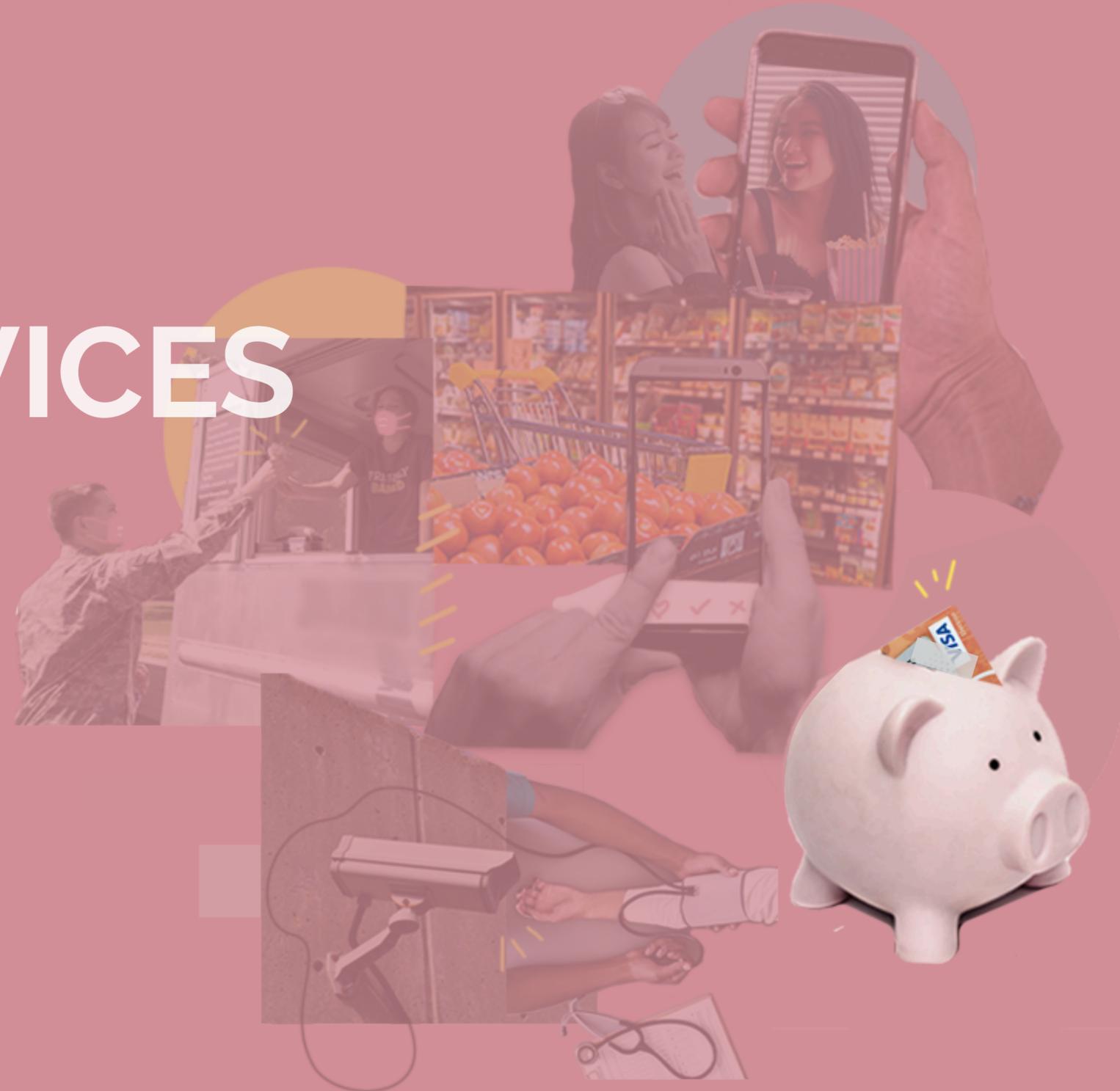
The need for 5G is constantly rising, not just because of individuals working from home and spending more time at home, but because other industries fundamental to their existence - banking, retail, and most importantly healthcare shift overbearingly to digital, not as an option but as the default.

Provocation

As you plan your travels for the winter holidays, you worry less knowing you can opt-in to the interactive AI service that allows your network provider to give you visibility into all essential services, no matter where you are in the world by connecting you with partners that are on their network - both in your current proximity and in your local residential area.

FINANCIAL SERVICES

As income levels fluctuate, individuals revisit their investment strategies. The finance world no longer relies on traditionally held pathways; new user journeys emerge on digital platforms. The financial service industry gears up to leverage technology, to embrace new influencers, channels and users.



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1 Meet them in the Tunnel, lead them out

Opportunity

Position offerings as familiar extensions

Under uncertain economic conditions, customers revert to familiar and trusted products. Thus positioning new offerings as add-ons or extensions to existing products can induce greater openness. This will allow the provider to meet the customer in the cognitive 'tunnel' they are in. Making sales channels for products less aggressive would reduce the level of caution customers feel. It also reduces the feeling of fatigue and aversion, as the act of reviewing new value propositions seems effortful and costly even if relevant to them.

Provocation

It's been a few weeks since businesses have made attempts to reopen. A few months ago during the lockdown, a couple of small business owners opted-in to a government system to exchange direct access to their phones' location and communication data in exchange of 'Citycoin' - a monthly sum from their local government. Their Citycoin spending patterns impact their CityCredScore (CCS) which will be used to evaluate credit applications.

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2 Make interactions not just frictionless, but kinder

Opportunity

Embed the human touch in contactless interactions

Designing digital experiences (both for end-to-end and single interactions) that are contextual and self-resolution oriented will become the norm. With the blurring lines between physical and digital, there is an immediate need for digital interactions to augment connection and foster trust, which was once sustained largely by physical contact. Be it customer service or digital payments, services that drive frequent, rewarding, comforting use during this time will see long-term customer engagement.

Provocation

The new update on your bank, 'Prob-Bot' doesn't just troubleshoot your current problems, but also holds a 'problem bank' from your past queries on the platform. From the moment you start using it you realize that Prob-Bot was designed to understand your context better, and is able to anticipate what you are most likely to have a query about on that particular day of the month, time of day from how you have initiated the chat.

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3 Leverage what gains trust now

Opportunity

Customer experience is the new sales champion

Customers might look for new sources of validation for their financial decisions, as existing sources (authorities) may have delivered less than optimal outcomes. Validation would be heavily based on relatability (familiarity, similar habits and goals) in the new normal, and these new 'influencers' would have disproportional impact on customer decision making in the near term. Actively designing with and to leverage the voice of 'consumers like me' to shape customer decisions, thus building new mental models around financial decisions can help forge a favorable bond.

Provocation

The product team of Investree has finally gotten comfortable with sharing big bet investment ideas not in long meetings, but in short burst videos from customer to customer. They never had to appeal to such a wide demographic range before. Their longitudinal profiling run for 30 days - 'Money Match' feature to simulate, map and co-create the right impact investing portfolio for you and your trusted circle of investors has gained high traction amongst the Gen-Z investors.

HEALTHCARE

As the world starts to 'reopen', individuals build new heuristics for what is considered safe. They further build a new level of acceptance for alternate ways of care, and of health being an active choice now. Authority figures fight to stay credible and influential in these uncertain times.



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1 Embrace the possibility of TeleHealth, not just Telemedicine

Opportunity

Offering a new longitudinal experience

Users have an expectation for high levels of ease, data stewardship and relationships over time due to experiences in other industries. Skeptical patients must experience systems to build emotional preparedness and acceptance. There has been no opportunity like now to engineer these transitions - to create a standardized, scalable patient experience. Leveraging electronic platforms to collect, collate and analyze data streams to allow patients and providers to view profiles in a comprehensive yet simplified manner. This would allow them to stay connected to 'good-health' centric milestones.

Provocation

The big launch of 'HealthierU' shows off its new capabilities for both practitioners and patients. Medicine time and dosage, lab test dates and results are shown graphically on-screen. It shows not just when but why the patient needs the next check-up. It sets goals for healthier living and also evaluates medication effectiveness by tracking minor symptoms to rule out signs of a developing illness. Meanwhile the system records online appointments, processes the natural language into EMR entries and generates alerts basis set thresholds, eliminating the need for cumbersome manual data entry or doctor visits.

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2 Reduce the gap between symptom and solution

Opportunity

Leverage readiness x necessity for digital to keep the patient involved, doctor informed & community safe

In addition to patients feeling isolated and vigilant, they also feel a lack of meaningful choices. Providing the patient a sense of ownership and agency by helping them record and report health events on a new micro, yet minimal scale would be optimal. Data from fitness trackers, sensors and medical records can be combined into a “health 360,” or may simply be the start of a narrative that ensures a useful dialog with the doctor while consulting or asynchronously. What the patient perceives as a new ease of use translates into greater connection to the healthcare system, and ensured community-wide safety measures.

Provocation

Nurse-AI partners work with a group of Type II Diabetes patients and their caretakers by providing easy templates for uploading information. Insulin and blood sugar monitor devices track and upload data daily. Patients use a simple app - GutFeelings to indicate how they're feeling, in addition to the data captured from the sensors. For some patients, especially those with multiple co-morbidities, additional sensors in the home monitor screen exposure, sleep, and toilet flushes. The system learns from all collated data to create patient-specific thresholds.

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3 Acknowledge that safety can no longer be assumed

Opportunity

Drive physical safety, but reduce the cognitive load of health protocols

Consumers are going to be overwhelmed by the number of dynamic and often complex protocols around safety. Every industry will have 'trial and error' protocols as personal, seemingly regular interactions like entering an office building (yours and others), sitting at a table in a restaurant, or traveling to a different city/country will now have social implications. With each place having its own rules, individuals will need help both navigating the rules, as well as to constantly have an easily-available record of where they've been, what they've been doing and how they've been.

Provocation

Your colleague was recently diagnosed with the flu on 'Health Direct'. While his home quarantine protocol was automatically activated, Health Direct made sure that his workplace received a leave notice with the verified diagnosis. He also had travel plans to visit his friends. In no time Health Direct informs the respective airlines and his tickets shift to a certified 'approved' date for him basis the intensity of his symptoms. It autosaves to his travel app, he will need that certificate at the airport too.

/ CHAT WITH US?



Param Venkataraman
Chief Design Officer
param@fractal.ai



Shefali Bohra
Co-Author & Designer



Shivani Gupta
Lead Author
shivani.gupta@fractal.ai



Isha Jain
Co-Author & Researcher



Bhushan Kumar
Co-Author & Researcher



Shekhar Menon
Co-Author & Researcher



Anupama Rao
Co-Author & Designer



***"Foresight is not
about predicting
the future, it's about
minimizing surprise"***

- Karl Schroeder

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For more insights visit,

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