Episode 1:

Insights to help B2C companies survive & thrive during COVID-19 derived from innovative message & image testing

This is the first episode in our three-part series based on a survey of 570 U.S. personal and business consumers:

Adapting B2B & B2C Strategies in the Time of COVID

Episode 1:
Insights to help B2C companies survive & thrive during COVID-19 derived from innovative message & image testing

Episode 2:
B2B & B2C products during and after COVID-19

Episode 3:
The changing consumer & business perspectives from COVID-19

The Gist

B2C organizations would be wise to create new options for interacting with their customers for the foreseeable future, but it's important that they not over-correct.

IMMEDIATE ACTIONS FOR RETAILERS

- People want to go into retail spaces but need to feel safe doing so.

- Physical spaces will need to be redesigned to allow shoppers space to minimize crowding.

- Contactless purchases enabled by technology are here to stay, but Americans are impatient and want online orders to be available immediately.

- Messages that provide consumers safety and convenience while providing the option to enter perform best.

LOOKING FORWARD

- Starbucks' recent announcement to close hundreds of stores and focus new store openings on mobile-only/quick pick-up locations to meet these changing consumer needs is a good example of a company using market and customer intelligence to adapt their offering to this shifting marketplace.

- Forward thinking: The pandemic may be just the fuel that accelerates adoption at scale of touchless vending machines, robotic warehouse pickers, contactless smartphone shopping checkouts, drive-through shopping, virtual events and training, and maybe even delivery drones.

A silver lining here for brick and mortar organizations exists despite the pain they're currently enduring. The acceleration of more curbside takeout and pickup orders and online consumption of services (e.g. events, training, entertainment) equates to more capacity to meet customer needs, not limited by physical space.

Based on this research, and observing consumer behavior across the country, there are people that will be comfortable going into physical spaces and there will be others that will prefer more contactless ways of interacting. Businesses who are prepared to serve this range of customer requirements will unlock new revenue that far exceeds prior limits.

The Details

Paradoxes often conducts variations of message testing for clients, especially when new products are launched. This testing indicates which messages are most popular, which features resonate most with customers, and which word combinations will positively influence the most people.

As the Covid-19 situation transitions from quarantine to opening, we asked 570 Americans which messages they prefer retailers use to communicate their reopening.

Those who took our survey were able to highlight words or phrases within example reopening statements, to indicate what they liked or disliked. The tested reopening statements create a picture of what kinds of languages is favorable and unfavorable to potential retail customers, and which words and phrases are divisive and should be avoided as businesses begin to re-engage customers.

Reopening Message Testing
Most Popular, Most Divisive and Negative

USE THESE WORDS	Score	AVOID THESE WORDS	Score
Your continued safety is our first priority	94.90%	Checkout using your smartphone	67.23%
Safe delivery to your home	92.52%	Schedule appointments for you	65.40%
Products will be disinfected	90.33%	Our stores will return to normal	63.23%
Contactless curbside pickup	88.60%	Conducting Business entirely online	49.78%
Keeping our customers and employees safe	87.90%	We have decided not to reopen	38.80%
Easy options for contactless checkout	84.04%	No longer allow walk-in traffic	30.62%

On the following page are the reopening messages we tested, in order of **most to least positive.** ▶

MESSAGE TESTING KEY	Mostly liked words are in **green**	Mostly disliked words are in **red**	Divisive words are <mark>highlighted yellow</mark>	Net Positive Score
	Words that >=15% of participants highlighted, and the majority are positive	Words that >=15% of participants highlighted, and the majority are negative	Words that >=20% of participants highlighted, but the number of positive and negative highlights were within 30% of each other are divisive	Total positive highlights – total negative highlights / total highlights

MESSAGE #1: 85% Net Positive

85% net positive

Now that stores are **open**, we **welcome** you back, but want to assure you that your **continued safety is our first priority**. We will **continue social distancing, eliminate lines,** and create **easy options** for **contactless checkout** using your <mark>smartphone</mark>.

FINDING:
Safe but quick shopping is popular, but not everyone wants to be tied to their phone.

MESSAGE #2: 84% Net Positive

84% net positive

We are **excited** to **reopen**, but due to popular demand, will be **continuing** to offer **contactless curbside pickup** for all **online** or app orders. **Simply press a button** to tell us when you have arrived and we'll bring your order right out to you.

FINDING:
Contactless curbside pickup is very popular, and consumers want to keep it.

MESSAGE #3: 75% Net Positive

75% net positive

Based on customer demand, despite the end of social distancing, we will **no longer allow** <mark>walk-in traffic</mark> but will instead **schedule** <mark>appointments</mark> for you to visit our showroom or retail outlet. You will be greeted by an associate who will provide you **white glove treatment** during your visit including loading your purchases in your car for you if desired. This will **reduce wait times** and make **efficient** use of your time and our staff's time.

FINDING:
People really want to enter stores, but are frustrated by lines, and miss the spontaneity of simply going to a store without having to plan ahead.

MESSAGE #4: 73% Net Positive

73% net positive

We are **excited** to **announce** that <mark>restrictions</mark> **are lifted**, and **business** in our **stores** will <mark>return to normal.</mark> Come on back and join our **happy family**.

FINDING:
Not everyone thinks a return to normal is a good idea.

MESSAGE #5: 67% Net Positive

67% net positive

In order to keep **prices low**, while keeping our **customers** and **employees safe**, we have decided **not to** <mark>reopen</mark> our showroom, and will be **conducting business** **entirely** **online** from now on. All **products will be disinfected** before they leave our warehouse to ensure a **safe delivery** to your home.

FINDING:
Again, people really like physically going into stores, and online-only shopping just isn't appealing to many. Safety is strongly embraced for customers, employees, products and delivery.

This technique provides math behind words. It enables us to quantitatively identify which words and phrases are most positive, negative and a mix of positive and negative. The mixed sequences are polarizing and should generally be avoided.

Below is an analysis of message #5.

We're showcasing the numbers behind this message as it portrays a range of sentiments.

Question		Total Volume	Like	Dislike	Positive or Negative?	Divisive Words?	% positive
1	In	30	19	11			63.30%
2	order	38	25	13			65.80%
3	to	34	22	12			64.70%
4	keep	71	57	14			80.30%
5	prices	137	120	17	positive		87.60%
6	low,	152	135	17	positive		88.80%
7	while	36	25	11			69.40%
8	keeping	63	52	11			82.50%
9	our	47	39	8			83.00%
10	customers	89	80	9	positive		89.90%
11	and	56	49	7			87.50%
12	employees	105	96	9	positive		91.40%
13	safe,	145	135	10	positive		93.10%
14	we	33	16	17			48.50%
15	have	37	18	19			48.60%
16	decided	71	30	41			42.30%
17	not	157	43	114	negative		27.40%
18	to	115	35	80	negative		30.40%
19	reopen	160	57	103	negative	divisive	35.60%
20	our	80	29	51			36.30%
21	showroom,	108	45	63	negative		41.70%
22	and	30	14	16			46.70%
23	will	40	18	22			45.00%
24	be	37	16	21			43.20%
25	conducting	88	46	42	positive		52.30%
26	business	89	47	42	positive		52.80%
27	entirely	148	64	84	negative	divisive	43.20%
28	online	177	90	87	positive	divisive	50.80%
29	from	67	24	43			35.80%
30	now	72	26	46			36.10%
31	on.	65	22	43			33.80%
32	All	72	65	7			90.30%
33	products	115	106	9	positive		92.20%
34	will	90	81	9	positive		90.00%
35	be	87	78	9	positive		89.70%
36	disinfected	274	245	29	positive		89.40%
37	before	66	59	7			89.40%
38	they	53	48	5			90.60%
39	leave	58	51	7			87.90%
40	our	40	35	5			87.50%
41	warehouse	58	51	7			87.90%
42	to	32	29	3			90.60%
43	ensure	59	54	5			91.50%
44	a	38	35	3			92.10%
45	safe	136	130	6	positive		95.60%
46	delivery	117	112	5	positive		95.70%
47	to	41	38	3			92.70%
48	your	45	41	4			91.10%
49	home.	56	49	7			87.50%
	NET POSITIVE		67%				

Total Volume:
Total highlights, **darker blue** is more volume

Like:
Total positive highlights, darker green is more positive

Dislike:
Total negative highlights, darker red is more negative

Positive / Negative:
Words that >=15% of participants highlighted,
and the majority are positive or negative

Divisive:
Words that >=20% of participants highlighted,
but the number of positive and negative highlights
were within 30% of each other

% Positive:
Orange is 90% + positive, **blue** is 80-89% positive
and **yellow** is 50% or less positive (meaning they
lean negative)

Below we have ranked the leading phrases sentiments across all messages,
with six of the most popular/positive phrases, four that are most divisive, and two
that are ranked most negative by our consumer audience.

Message Testing Reopening Phrases across all messages:
Most Popular, Most Divisive, Most Negative

Phrase	Positivity Score (out of 100)	Categorization
Your continued safety is our first priority	94.90%	Most Popular Phrase
Safe delivery to your home	92.52%	Most Popular Phrase
Products will be disinfected	90.33%	Most Popular Phrase
Contactless curbside pickup	88.60%	Most Popular Phrase
Keeping our customers and employees safe	87.90%	Most Popular Phrase
Easy options for contactless checkout	84.04%	Most Popular Phrase
Checkout using your smartphone	67.23%	Most Divisive Phrase
Schedule appointments for you	65.40%	Most Divisive Phrase
Our stores will return to normal	63.23%	Most Divisive Phrase
Conducting Business entirely online	49.78%	Most Divisive Phrase
We have decided not to reopen	38.80%	Most Negative Phrase
No longer allow walk-in traffic	30.62%	Most Negative Phrase

Image Testing

Another technique we use is to test the feelings triggered by various images, ads and promotional materials overall and by image area. We asked respondents for their reaction to various images.

While we know people are eager to get their lives back to normal, they expressed far more fear and anxiety than hopefulness and joy about returning to crowded spaces. Overall testing of this image of a crowded coffee shop which was totally normal just a few months ago, now evokes a high degree of anxiety and fear.

Q: How does this picture make you feel on a scale of 0 to 10, 0 being "not at all", 10 being "extremely".

Emotion	Score
Anxious	5.9
Fear	4.9
Anger	4.3
Sadness	3.9
Hopeful	3.2
Joy	2.9
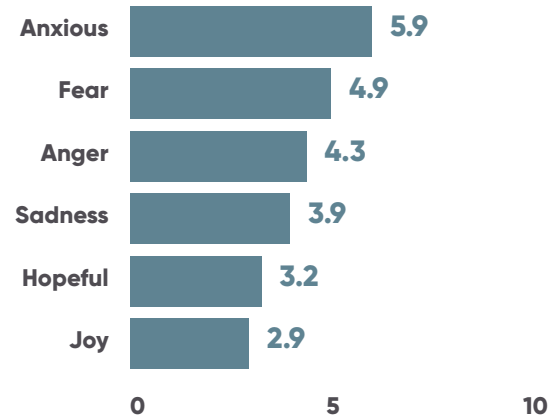
n=570, General population, 5/2020

Looking at sectional image tests indicates the high favorability respondents currently feel toward health care workers (nearly 50% liked that section of the image), while the woman protester was the most disliked (35%). Nearly 85% were most neutral toward the truck flag (section 3).
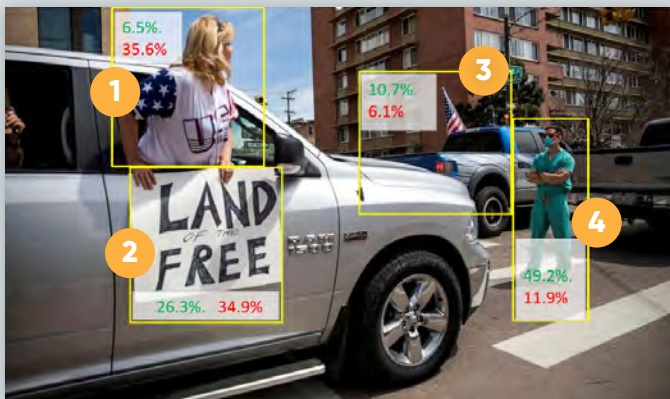
Respondents were asked to click on any sections of the image they like or dislike, and click to turn them **green** or **red**.

Description	Dislike	Neutral	Like
1 Woman protesting	35.60%	58.00%	6.50%
2 Land of the free sign	34.90%	38.90%	26.30%
3 Truck flag	6.10%	83.20%	10.70%
4 Healthcare worker	11.90%	38.90%	49.20%

Likely future behaviors

Using a best-worst scale methodology (also known as Max Diff), we examined what people are most and least likely to do as the country reopens. Despite their fears, people are eager to go back out in public again with anticipated limitations.

To get a sense of which activities are going to bounce back the fastest, we asked people to choose the thing the would be most and least likely to do in the months following quarantine, as businesses reopen. What we find is that people **will go to dinner, they will go to the movies,** but a lot of them are probably **going to be wearing masks when in crowds.**

Total Sample (n = 570)	Most Likely to Do	Least Likely to Do	Utility Score	Total Choices
Wear a mask in public	86.10%	13.90%	0.39	309
Go out for dinner at a sit-down restaurant	83.20%	16.80%	0.14	119
Go to the movies	60.90%	39.10%	0.02	64
Attend a work conference	56.80%	43.20%	0.01	44
Go to a bar	39.40%	60.60%	(0.03)	71
Attend a sports event	30.50%	69.50%	(0.04)	59
Attend a live concert or play	30.00%	70.00%	(0.04)	50
Fly in an airplane	29.80%	70.20%	(0.07)	104
Work in a crowded environment	28.80%	71.20%	(0.05)	66
Commute on public transit	27.00%	73.00%	(0.05)	63
Vacation on a cruise ship	7.30%	92.70%	(0.29)	193

n=570, General population, 5/2020
Utility Score = (count of most likely - count of least likely) / total n

Respondent verbatims indicate there is a huge amount of pent-up desire to be with family and friends, go out to eat, go to a store, travel, and get back to work.

We asked respondents "What are you most excited about doing once social distancing ends?". Below is a table of consumer responses, coded and organized by themes or topics. Based on the table below, people are most excited about connecting with people in person, eating out, and entertainment – though they will likely go out with a mask or other precautions.

Verbatim Table: Coded Open-Ends by Consumer Responses

Consumer Topic Responses	Total Instances
Connecting with people in person	156
Eating out	73
Entertainment	38
Outside without mask/precautions	37
Returning to work	28
Travel	28
Purchases	23
Gym/Sports	19
Routine	10
Church	9
Other	80
Mixed/Rambling	22

Common responses (examples below) to the question: "What are you most excited about doing once social distancing ends?"

"*Getting together with my small group of family and friends and going out to eat.*"

"*A great meal at a restaurant.*"

"*Truthfully, just seeing my family.*"

"*Traveling and outdoor events.*"

And more soulful responses such as:

"*Being able to engage in all the things that define one as human. Particularly and specifically interacting with other humans on all levels – personal and professional. Looking people in the eye to see what's there. Outside of (or in conjunction with) that, the simple pleasures of life: release from the strain and fatigue of survival decision making; eating in a favorite restaurant without fear or concern; walking to a local shop, making a purchase and walking back home again. Having people break bread with me at my own home's table.*"

In our next episode of **Adapting B2B & B2C Strategies in the Time of COVID** study, we will explore B2B & B2C products during and after COVID-19.

About Paradoxes

Established in 2007, Paradoxes is a strategic marketing organization that gathers and analyzes information to help clients make sales, marketing and product decisions.

Our focus is on creating sturdy foundational marketing components, anchored in customer and market intelligence, that span the product lifecycle: Design, plan & build; Market & sell, and Adopt & use.

We welcome the chance to test messages for your company, produce strategies for evolving products in a post-COVID world, or to produce research like what you see here. You can find us at **paradoxesinc.com.**