

The Future of Hygiene

Constructive Expansive Futures

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There has been significant interest in Futuring as a discipline after COVID-19, as multiple industries are beginning to interrogate their post-Covid future. Quantum Consumer Solutions and Unilever came together to interrogate the post-COVID future of hygiene in Europe, to inform brand and product strategy for Unilever. This project took a culture-first approach to futures, with a diverse and inter-disciplinary team working together using an Agile approach. Using a mixed-methods approach, the team used a combination of digital ethnography, speculative design and an Opportunity Spaces framework to distill the future of hygiene into ten Opportunity Spaces for Unilever. Readers can expect to learn more about why a culture-first approach to futures is recommended, how speculative design could represent an 'ethnography of the future' and how a simultaneously analytical and creative approach to futuring could be translated into tangible business outcomes.

BACKGROUND

The Human Capacity for Adaptation

After a London transport strike in February 2014, commuters had to try new routes for their commute – an estimated 5% of commuters never went back to their original routes. This simple story speaks to the human capacity for adaptation, and when watershed events like COVID-19 take place, they have the power to interrupt the regular pace of change and alter human behavior suddenly and permanently.

The impact of COVID on wider culture has been far-reaching and has deeply impacted the future trajectories for multiple industries that ethnographers need to map and that businesses need to design for.

As a human insight and design strategy company, Quantum partnered Unilever to explore the forces shaping the world during COVID-19 and help Unilever design a response to a post-COVID future through their products and brands.

In doing this work, our central hypothesis was that when societies experience long-drawn existential threats, these experiences have the power to reconfigure our mental models and redraw our priorities. As an example, it only took a few weeks of a national lockdown in Italy for the country to shift to remote work – a behavior that Italians considered inconceivable until then.

The Future of Hygiene

In this project, Quantum and Unilever partnered to explore the Future of Hygiene in Europe. The hygiene category was going through an unprecedented growth, but it was also clear that category drivers, consumers needs and preferences and the innovation landscape would be unrecognizable on the other side of the pandemic. For instance, Hygiene had suddenly become the most exciting space for innovations – all the way from FMCG companies to tech organizations. In this reality, exploring the Future of Hygiene would help

Unilever build the most competitive brands in the future and develop cutting-edge innovations for a new normal.

It was evident from the very beginning that numerical forecasts and data-driven projections are likely to get it wrong, and a culture-first approach was required. Experts in the human sciences have often studied hygiene and how it relates to culture, human psychology, and the very fabric of society. A lot has been said about hygiene and how it relates to social class, othering, disgust, and a range of other human experiences. Whether it is Mary Douglas' famous phrase 'Dirt is matter out of place' or the correlations made between physical disgust and social disgust, it was clear that deeper human and cultural forces were at play. The stage was set for some of these narratives to re-emerge and take center-stage and this was bound to have implications on our priorities and our behaviors.

APPROACH

A Culture-First Approach

A challenge and opportunity in studying a topic such as hygiene during COVID is the abundance of material to review. There was scientific evidence, market data, sales numbers, advertising analytics, trend reports – the list goes on. For this project, a unifying lens was culture – whether we looked at market data or read an op-ed, the guiding question was: what does this tell us about the shift in people's values, priorities and mental models.

For instance, Sweden's unique approach within Europe was not because they were following a different science, but a different set of cultural values. The political concept of 'folkhemmet' meant that the COVID response had to be a shared responsibility across citizens, rather than a heavy-handed approach. Further, the cultural notion of 'lagom' meant that Swedish citizens expected a measured response – just enough, but not too much. Contrast this to Italy, where there was music in the streets playing from people's balconies as the collective spirit of Italian culture was on full display.

A culture-first approach was beneficial because it allowed us to look at the emerging future more holistically and ground ourselves in how people are most likely to experience it. In contrast, examining the future through a technical or business lens might have been myopic. For instance, modelling scenarios based on COVID case numbers would have led to incorrect projections, because future variants would not have been accounted for. A business approach of growing sub-categories (e.g. the growth in anti-bacterial wipes) may or may not have had validity in the long-term. In contrast, a culture-first approach ensured that the future we are anticipating is likely to play out, and gave us tangible ways to act in response to that future.

A Diverse and Inter-disciplinary Team

Uncovering deeply held cultural notions, translating these into future scenarios and guiding business actions required more than one expertise. The collaborative Unilever and Quantum teams represented expertise in research, social media listening, marketing, speculative design and strategy. Further, this team was made up of people from different European countries to represent cultural diversity.

The research and social media listening expertise was key to uncovering the human and cultural experience – how COVID-19 is being perceived, how people are responding to it,

etc. The marketing expertise was key for taking a product and brand lens – how consumer-facing brands are responding to COVID and what are the unmet / under-met consumer needs. The speculative design lens was key to bring in non-linear thinking – not just assuming that there is a straight line from the past to the future but allowing for non-linear trajectories. And finally, the strategy skill set was key to translate all of these learnings into actionable business outcomes.

Collaboration across diverse groups requires a combination of structure and flexibility – we enabled this by following an Agile approach and organizing the project into targeted sprints. For each sprint, we would have the entire team working together, bringing all of this diverse expertise into every step of the work. By doing so, we allowed for all aspects of the work to be grounded in research, imaginative and strategic, rather than see these as linear steps in a journey.

A Multi-method Approach

Towards this project, we used a combination of three methodologies: (1) Digital Ethnography, (2) Speculative Design, (3) Opportunity Spaces framework at the intersection of needs and mental models.

Digital Ethnography was deployed because the human and cultural response to COVID-19, both in broader societal trends and in hygiene behavior was well documented online and it allowed us an opportunity to access these learnings at scale.

Speculative Design was critical because any disruptive event such as COVID can fundamentally change future trajectories. It was important to build in this non-linearity in our approach.

The Opportunity Spaces framework was key because we need an expansive frame – not just react to new needs via incremental product development, or respond to new mental models with communication messages, but a higher-level reframe of the Opportunities available within hygiene in the future.

Digital Ethnography

Digital ethnography helped us follow the consumer's online footprint by analyzing their search results, social media activity, purchases and behavioral patterns. This was powered by Unilever's internal People Data Center capabilities that follow best-in-class practices on digital ethics and privacy. Specifically, we looked at:

1. The ways in which the Hygiene conversation was showing up in culture. As an example, when EU leaders decide to greet each other with the 'elbow bump', what does that mean?
2. Consumer responses to mainstream brand advertising and the elements that were most discussed on social media
3. Online chatter around hygiene innovations at the cutting-edge to examine the bets being made on the future and how these were being received
4. Search data that outlined what people were looking for – whether specific products or brands, or specific needs. For example, search queries around how to keep door handles clean revealed a new space of anxiety

Speculative Design

It was important to break out of linear futures and towards this, we adopted a speculative design approach.

Traditional trend-forecasting techniques rely on the observation of present phenomena and our assessment of how these are going to evolve and then impact the future. This technique is more effective in investigating short-term and more predictable futures where there is enough information and precedents to assume that certain conditions might evolve in a linear direction. However, the spectrum of possibility is much wider than what we can predict. The sheer number of variables we need to consider, and the presence of invisible forces might lead to “black swan” events such as COVID-19 and this show us the limits of an approach solely based on forecasting.

Think of it as an ‘ethnography of the future’, where a group of futurists were given a series of ‘What If’ questions and were asked to write a story, construct a scene, or develop a prototype in response to this question. Our futurists included an architect, an urban planner, a fashion and experience expert, a gallerist, and an artist. We prepared a different brief for each of them and gave them a week to work on a medium of their preference. Some of them preferred to illustrate some concepts with sketches, some others preferred to write a series of fictional short stories. We encouraged creativity and radical views, without interfering in the creative process. The fictional cultures, behaviors and societies that they imagined and created became a mirror with which to better understand the present.

“Yes, sure. Let’s go out for a beer. Oh wait, this week is still for residents only, too bad! Maybe they let you in if you have your MED I.D. with you. You have been screened recently right?”



In order to statistically prevent outbreaks during the unfavourable seasons, in cities bars and restaurants are limited to residents only. Limitations last from 2 to 6 weeks and are scattered. This algorithmic solution reduced even common colds effects.

Figure 1. A scene set in the future imagined by a futurist, illustrating how vaccine passports might become mandatory for any out-of-home social activity. This fictional scene was created well before such a mechanism was being seriously considered by policymakers.

Credit: Valerio Massaro

As an example, one of our futurists imagined a polarization of society into pro-germ ‘Gaians’ and pro-tech ‘Trans-humans’. While this precise scenario might not play out, it

raised important questions that needed to be asked and answered in the future of hygiene. Further, when this imagination of a fragmented society was taken to mainstream consumers, their response told us a lot about the groupism that COVID might create in society: between the vaccinated and anti-vaxxers, mask wearers vs. not, and so on. Importantly, it revealed that hygiene was soon to become a conversation about identity and ‘tribal’ association, not just a simple behavior.

In this way, Speculative Design helped us simultaneously get a perspective on the future and on the present moment, both expanding and grounding our thinking.

Opportunity Spaces Framework: Needs and Mental Models

All of these diverse data points and perspectives were pulled together with two key lenses:

1. Needs: what are the key consumer needs from hygiene, now and in the future? How do these map to the most mainstream needs that we can see today vs. the most super-emergent needs that are likely to play out in a few years?
2. Mental Models: what are the emerging consumer mental models in response to COVID? Some of these might be carried forward from historical and culturally coded mental models, and others might have emerged solely as a result of the pandemic.

In defining needs, we were mindful of considering both functional and emotional needs. In doing so, we were trying to avoid two common pitfalls. Firstly, there is sometimes a tendency to over-emphasize functional needs because they are more visible and easily understandable. Secondly, it is often tempting to classify need statements as being exclusively functional or emotional when in reality, each need might carry both a functional and an emotional element.

In identifying Mental Models, it was important to first define these and build shared understanding among the team. We defined these as being a composite of values and behaviors that influence the many mindsets that people might view the world from. In this process, we were mindful of our own political leanings and potential biases that might creep in from these. Our aim was to define these mental models in ways that were as apolitical as possible, without any value judgment and we continuously interrogated and corrected for this.

OUTCOMES

Ten Opportunity Spaces

These learnings and perspectives on the future were translated into 10 Opportunity Spaces that would help business leaders and key decision makers engage with the future. Each Opportunity Space was crafted at the intersection of multiple needs and mental models, creating a 2x2 Opportunity Map that pulled together the entire project in a single visual, driving stakeholder engagement.

Because these Opportunity Spaces were built from both mainstream and emergent needs and mental models, the Spaces also represented an expansive imagination of the Future of Hygiene – not only limited to a chemical ‘kill all germs’ approach, but a broader landscape that considers our changing emotional and cultural relationship with hygiene. One

of the most evident examples is that with COVID-19, hygiene was no longer a private conversation, but had to be ‘demonstrated’ in public spaces through clear signals of compliance to the rules and best practices, such as wearing a mask in public, and sanitizing our hands before entering a public space.

Each Opportunity Space was further crafted and brought alive, by illustrating its driving factors, the ways in which it shows up, corresponding needs and mental models, emerging innovations that speak to this and specific design challenges emerging from each space.

Consumer Jobs-to-Be-Done

We further deconstructed each Opportunity Space into jobs-to-be-done, bringing in specificity in terms of the consumer’s situational context, their motivation and the outcomes they were working towards. This specificity ensured that we were not talking about the future with abstraction but doing so in real terms. It also helped nuance the Opportunity Space into specific initiatives and actions that Unilever teams could take forward.

As an example, the process of nuancing an Opportunity Space that related to inclusivity ensured that the team built an appreciation for the challenges faced by several under-represented groups and how the specific response required for these groups might be different in terms of product innovation, ingredients and formulation, packaging and even communication.

Defining Areas of Play

Each Opportunity Space was mapped against Unilever’s wide portfolio of brands and innovations, to identify gaps and areas of strength. This provided business leaders with clear areas of action and helped them identify the future opportunities that they are best placed to leverage vs. those that might need most investment to access.

This also meant that the output was actionable across multiple levels – brand teams looking at global brand opportunities, innovation teams considering product development, country leadership teams looking at wider portfolios, etc.

IMPACT

Reframing Future Direction

These Opportunity Spaces are now at the heart of the future of hygiene conversation at Unilever and informing a number of initiatives across marketing and innovation for some of the world’s biggest hygiene brands. Importantly, the culture-first and non-linear approaches have meant that these initiatives are not just predictable and safe bets, but also projects that are anticipating a number of different future scenarios, and building an expansive Future of Hygiene. Our approach has provided a number of different possibilities to a number of different brands, that are now equipped to select the most brand-aligned opportunities and respond with a combination of product innovation, marketing messaging and overall brand strategy.

This work has been cascaded widely and a number of leadership teams have engaged with these futures. This has sparked conversations beyond the initial scope of the project and continues to inspire new initiatives within the organization. For instance, while the initial scope was limited to Europe, these Needs and Mental Models are being ‘pressure-tested’

outside of Europe to understand if and how they apply, and how these might need to be adapted.

Recognition for the Approach

This approach and its various facets (Agile, collaborative team, culture-first futures, speculative design) have been widely recognized as research innovation and best-in-class futuring at Unilever. Aspects of this are being replicated across the organization, both with Quantum and with other partner organizations.

The Agile approach is being replicated both in futures projects and for other project types – the success of a collaborative model has created greater confidence within the organization that such an approach can be used for big strategic questions.

The tech tools used to facilitate the Agile approach (e.g. Miro whiteboard) have been adopted more widely after this project and have become mainstream, both at Quantum and at Unilever.

Speculative design, which was previously seen as a good-to-have has now got greater recognition and senior leaders acknowledge that it could uncover new insight that would otherwise be missed.

KEY TAKEAWAYS

A Changing Paradigm of Hygiene in Europe

In the old paradigm, hygiene in Europe was taken for granted. Hygiene receded into the background and was not on consumer's minds. As an example, eating bread directly off a restaurant table was normal. Germs and dirt were considered to be an essential part of life.

In the new paradigm, hygiene in Europe is taking center-stage: handwashing and face masks have become key symbols of responsible behavior. In addition, hygiene is no longer personal and private, but about public commitment and social responsibility. A step further, hygiene is getting politicized and starting to polarize societies.

Specific Lessons for Wider Applicability in the EPIC Community

- An expansive act of anticipation requires that we ground the future in human and cultural truths: while futuring based on technical data can provide more predictability and control, it could also narrow the frame of investigation too quickly. A human and cultural approach might be more effective in keeping the frame expansive.
- We need to play an active role in shaping the future, not just accept it as a given: from a strategy perspective, this helps to identify the ways in which the organization could influence and shape these futures
- We need to recognize the multiplicity of futures, rather than place all bets on one vision: it is valuable to have the humility to accept that as the future unfolds, most futuring exercises will miss the mark to some extent. Creating multiple futures allows futurists to approach the problem with this humility and steer stakeholders through multiple possibilities

- Digital Ethnography can step in effectively when in-person ethnography is challenging: while this is well documented in the context of COVID-19, this project continues to reinforce that digital approaches can be highly effective
- Speculative Design helps explore non-linear futures and can represent an ‘ethnography of the future’: as ethnographers, we are intensely focused on the details of the present and placing these in a broader context. By imagining a society of the future, Speculative Design creates a rich future world for ethnographer to examine and decode.

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NOTES

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