T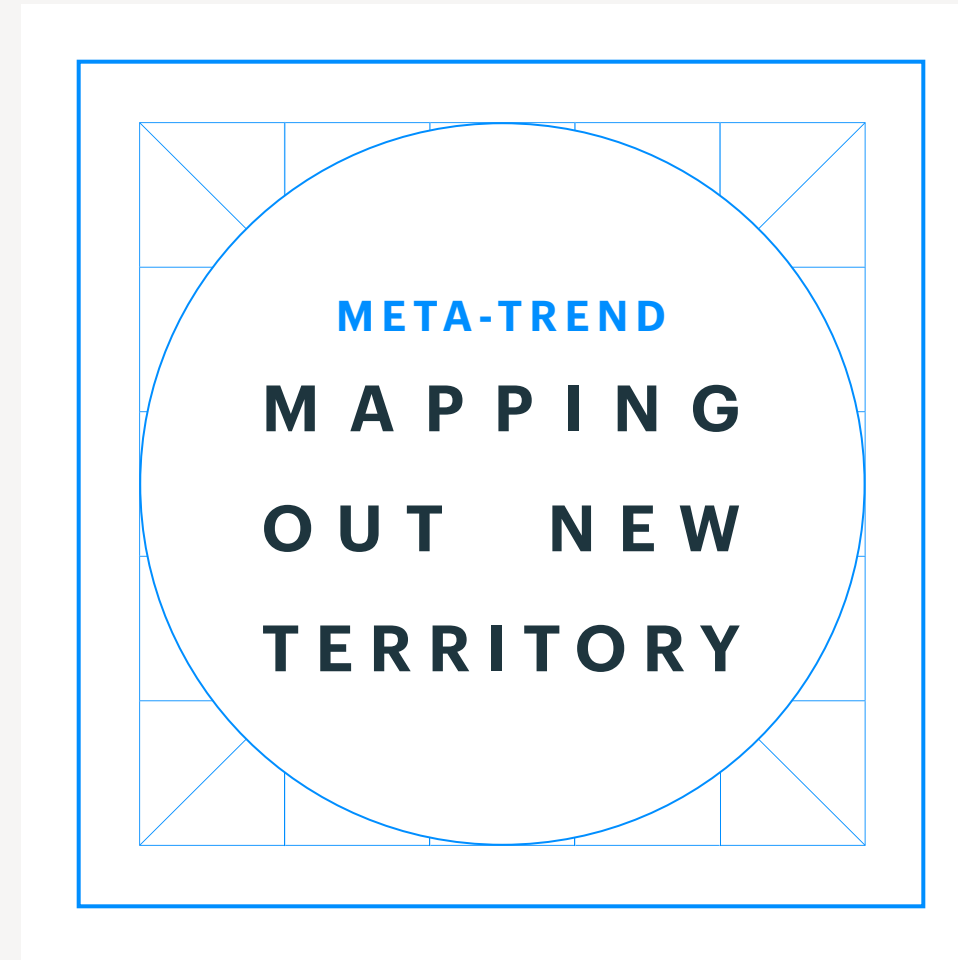his year's Fjord Trends are like no others that have gone before, shaped during a period of comprehensive, global uncertainty. Even in the time it's taken us to write them, the situation has evolved frequently, so it's possible that we might issue a second edition at some point — particularly if a successful vaccine transforms the landscape. (We can but hope.)

As we looked through the submissions for this year's trends from our designers around the world, one thread connected them all: a sense of displacement. In 2020, the transformation in who we are in the world and how we move through it has been unquestionable. We liken it to standing on your own street corner and finding, in the blink of an eye, that someone redrafted the map of the neighborhood you've always known, leaving you seeking the comfort of familiar sights that stay just out of view.

The reassuring thing is that we're all in the same boat of uncertainty and unpredictability. We've tried not to let the pandemic make Fjord Trends 2021 a gloomy read, but pretending it isn't a factor would be to render them irrelevant before we even hit "publish". Yes, Covid-19 has made things tough for people and businesses alike, but we can and will come through this.

Stay safe.

Mark Curtis & Martha Cotton

META-TREND

MAPPING OUT NEW TERRITORY

The past year has forced us to experiment with new solutions, new places and new experiences. It changed how we live, work, learn, shop and play, as well as how and where we experience things. It pushed us into remote working, muddling the relationship between employer and employee. The more time we've spent interacting with the world through a screen, the more we've craved a break from digital confinement. As a result, we've become at-home innovators, developing new strategies and "life hacks" to deal with our strange and unbidden circumstances.

A brand-new set of challenges has emerged for businesses: how to respond from operational as well as communication perspectives, how to meet our constantly changing expectations, how to stretch their empathy — all while fighting for survival in a precarious economy. Their resilience and agility have been put to the ultimate test, the winners being those who can reunite us with the feeling of being grounded in a place.

When we predicted a major realignment of the fundamentals around new definitions of value as our meta-trend for 2020, the world already felt like it was at a tipping point. That was before we had any notion of the virus that has since upended our experiences and how we go about life.

The pandemic only accelerated the realignment we envisaged. It shed more light on the fact we still live with systems that are sometimes broken and often unequal — and consequently unfit for the challenges of the 21st century. It's made many of us reflect on our role in the world, the importance of communities and the realization that our actions (big and small) have an impact on systems much larger than us.

In the current transition phase from crisis response to a new operational model, we have the opportunity to examine the changes thrust upon us and the innovations we've seen emerge, and to reflect on how we want to move forward. Mapping out new territory is our meta-trend for 2021. As we look to the future, a wealth of potential worlds open up in front of us. Some are scary, some are exciting, all of them are largely unexplored.

2021 will be about creating new maps to help us uncover what's yet to come, and planning a route to the world we want to live in. We're all exploring, which is creating a safe space for experimentation, prototyping and learning. Throughout history, after a global crisis, a new era of thinking has begun. Right now, we have an opportunity to decide what we want the 21st century renaissance to look like.

Contents

COLLECTIVE DISPLACEMENT

INTRODUCTION

In 2020, the world collectively came to know what displacement feels like. How and where we experience things changed, leaving us feeling disconnected from familiar comforts both big and small. While work to eliminate Covid-19 continues, organizations must find new ways to reach and communicate with people, and to deliver brand experiences at a distance, in a different spatial and social context.

The pandemic has shaken up how and where we work, learn, play and shop, blurring previously clear boundaries.

WHAT'S GOING ON?

The global pandemic has displaced how and where we work, learn, shop and play — and even where we live. Some of these shifts might be permanent and others temporary but, for now, the impact of all this change on our sense of belonging and identity is creating a feeling of collective displacement likely to have significant impact on the path of recovery (and beyond).

It's important to note our choice of words, here, because displacement is not the same as loss. We're not talking about what we've lost, but about the many things we did before 2020 and are now doing in different ways, in different places, and with (or without) different people.

When millions of people worldwide started working from home during lockdown, formerly intimate spaces took on a new professional function. The forced closure of bricks and mortar stores helped fuel a rapid rise in online shopping, turning our homes into virtual store fronts while leaving once crowded physical spaces empty. When homes also started serving as schools, gyms and cinemas, among other things, businesses suddenly faced a visibility challenge: just how can a brand ensure it stands out in such circumstances?

Relocation was a common global theme in 2020. In Asia, Covid-19 flipped the idea of living in densely packed metropolitan areas from exciting and desirable to something to avoid. In the Philippines, we've seen fresh momentum behind proposals for the "thinning out" of Manila, with city dwellers being offered cash and goods to move back to the provinces.

Demand for rural homes in Germany rose sharply when lockdown began in March and continued to rise steadily in the months that followed. In France, an estimated one million people fled the Paris region in late March to spend lockdown in the countryside, then six months later we saw a spike in property sales after many decided not to go back. By September, for the first time since the Great Depression, the majority (52%) of young American adults were living with their parents.

Emerging hand-in-hand with place displacement, activity displacement is simply about the change in how people do things. Almost overnight, school lessons and doctors' appointments were online. Yoga classes, concerts and weddings were streamed via Zoom. There was a big rise in the number of people using dating apps and scheduling first dates on FaceTime to help them decide whether it was worth meeting in person. All of which raised the question: which activities will flip back once the pandemic has passed?

Activity displacement describes the many tasks we've relocated or adjusted so we can still do them safely.

Community displacement changed the makeup of the people with whom we share space. Where groups of people gather changed, as well as the shape and size of those groups. Doing things communally — like going to a concert or football match or even just dinner out with friends — was replaced by doing things alone, as households, in officially permitted bubbles or pods, or virtually.

Ever-changing Covid-19 control measures (and consequences for non-compliance) have displaced people's sense of agency over their own choices, which is one of the feelings associated with healthy mental wellbeing. By July, 67% of the world's households expected to do most of their socializing at home for the following six months. By September, the UK government had amended its rules more than 200 times and subsequent national lockdowns intensified as winter marched on.

The liberty we took for granted won't be a given until the virus is fully under control, and it's hard to come to terms with sacrificing our spontaneity and access to the people we love (for an unknown period of time).

The pandemic pushed many of the seemingly little things that brought us joy beyond our reach or otherwise limited our access to them. When considering a bigger picture that includes loss of life, we don't feel it's appropriate to grieve for the displacement of those little things. For these reasons and more, our emotional and mental wellbeing is taking a hit.

Displacement seems to be fast becoming a self-perpetuating reality. Consider the knock-on impact of fewer people in offices leading to the closure of local businesses that set up nearby (think lunch places, pharmacies, post offices, dry cleaners, gift shops) and how that, in turn, makes those offices less desirable places to go to, and results in more jobs lost for the people that are employed in these businesses. In the US, 60% of Yelp businesses that closed during the pandemic are now expected not to reopen. If a shopping mall loses a large department store that was once its major draw, what will encourage shoppers to return?

Collective displacement has changed people's behaviors dramatically. Many companies must now deal with the fact that the customers they knew have dramatically changed.

Our behaviors and habits have changed dramatically in the past year, so companies must get to know us all over again.

66

Previously bustling places were suddenly deserted during lockdown. If a shopping mall loses a large department store that was once its major draw, what will encourage shoppers to return?

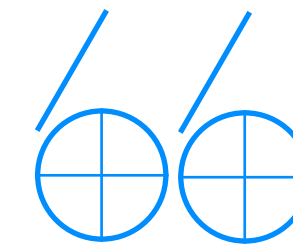Many of us are used to being introduced or exposed to countless brands on our daily commutes. How do brands remain visible in a world that's slowed down?

WHAT'S NEXT
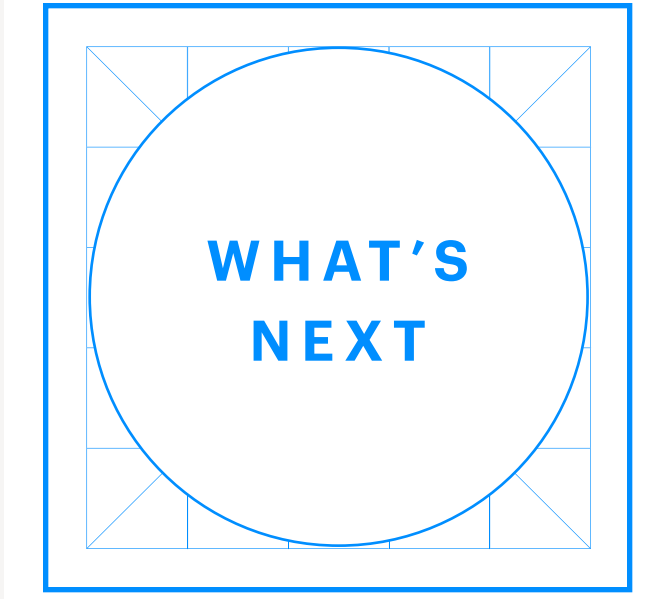
Companies must question everything they thought they knew about their customers, and how much their customers know about them. If, for instance, people are no longer using public transport, they won't see the advertising that used to adorn their daily commutes. Brands must adapt to new routines with fresh ideas. They must ask how people's behavior has changed — especially when it comes to the places and ways that they once came to know about products and services.

It'll take new solutions to deliver experiences away from those physical spaces where customers and brands previously interacted, and in a context outside a brand owner's direct control — but it's doable. The London Marathon in October 2020 saw a staggering 43,000 runners participate virtually — a great example of how a bespoke online experience can successfully shake up something we may only have imagined happening in person. With an innovation mindset, it's possible to deliver experiences that are safe for customers and employees (yet still owned by the brand,) by combining high-touch and low-touch elements.

A powerful example is the virtual store launched in the first half of the year from Shanghai luxury art mall K11, which enables people to tour, browse and purchase from 46 different brand stores via WeChat. Another is Starbucks's new experience for customers at pick-up points or using its app. It wants to deliver the same personal experience at all touchpoints, in an effort to stay true to its core belief in the importance of connection outside home or work, known as "the third place".

Some new brand experiences will only be needed until touchpoints revert to a brand's direct control, while others will stay around for the long term. In both cases, there are immediate challenges to consider:

First, brands should understand how information-gathering has changed. Social media had already rewritten the rules of how people decided what to do, where to go and what to buy but, even so, a lot of information and inspiration still came from moving around freely — until Covid-19. Brands that relied on long-established behavior patterns for exposure need to look at ways to become more visible in people's new paths around their local areas.

The K11 luxury art mall in Shanghai enables people to browse from 46 stores via WeChat.

Augmented Reality is coming into its own, enhancing our ability to make wise purchases from home. NIKE uses AR to help people get the right sneaker fit without trying on in-store.

Many online shops don't currently offer quality browsing, and prioritize displaying products over shaping the customer experience, limiting people's ability to discover new things. There's an opportunity to make significant changes (an opportunity most really should take).

For instance, MAC Cosmetics uses Augmented Reality (AR) to enable customers to virtually try on products via YouTube, and Nike uses AR to help people get the right sneaker fit without trying on in-store. People rely on detailed, evocative copy when they can't physically touch, smell or try a product, so brands would do well to consider how they might change descriptions to better convey why they're worth buying.

Second, they should deal with the fact that shopping has become atomized into many micro-moments spread throughout the day and across devices. We expect to see commerce shift from being centered around a destination (whether that's a store, a website, an app) to hanging on moments. Social media will be the prompt for many of these moments — it will be able to influence and propagate people's intention to buy, and will likely become a catalyst for change. Grabbing customers' attention and keeping their focus on the brand in those moments will become a challenge for organizations.

Third, they might need to find ways to replicate or replace physical touch using digital. The ability to feel textures and try products helps people work out the quality and craftsmanship, dimension and fit, giving them the confidence to buy. In some cases, simply investing in good, detailed copy will help give people what they need to make a decision.

One company actively exploring this is RefaceAI, the company behind an app used to transfer any face onto a selected image, which has been

primarily used to upload faces onto gifs. Now, the company behind it is exploring commercial opportunities including those in fashion — for example, for virtual fashion photo shoots.

Finally, they must explore fast-growing opportunities to deliver joy through immersive experiences, which are new and exciting for customers at a time when excitement is infrequent. It means recreating out-of-home experiences in the home with new devices such as Apple's 5G iPhone, which make immersive experiences more feasible. It's a brand's opportunity to enable people to explore their products and services with sensory experiences that bring a sprinkle of magic to the normal ecommerce platform.

In a survey of more than 3,000 people in North America, Europe and Asia Pacific, customers' increasing willingness to try immersive technologies has inspired 64% of leading consumer brands to invest in Augmented Reality, Virtual Reality, 3D content and 360-degree video. As a result, more companies are following suit.
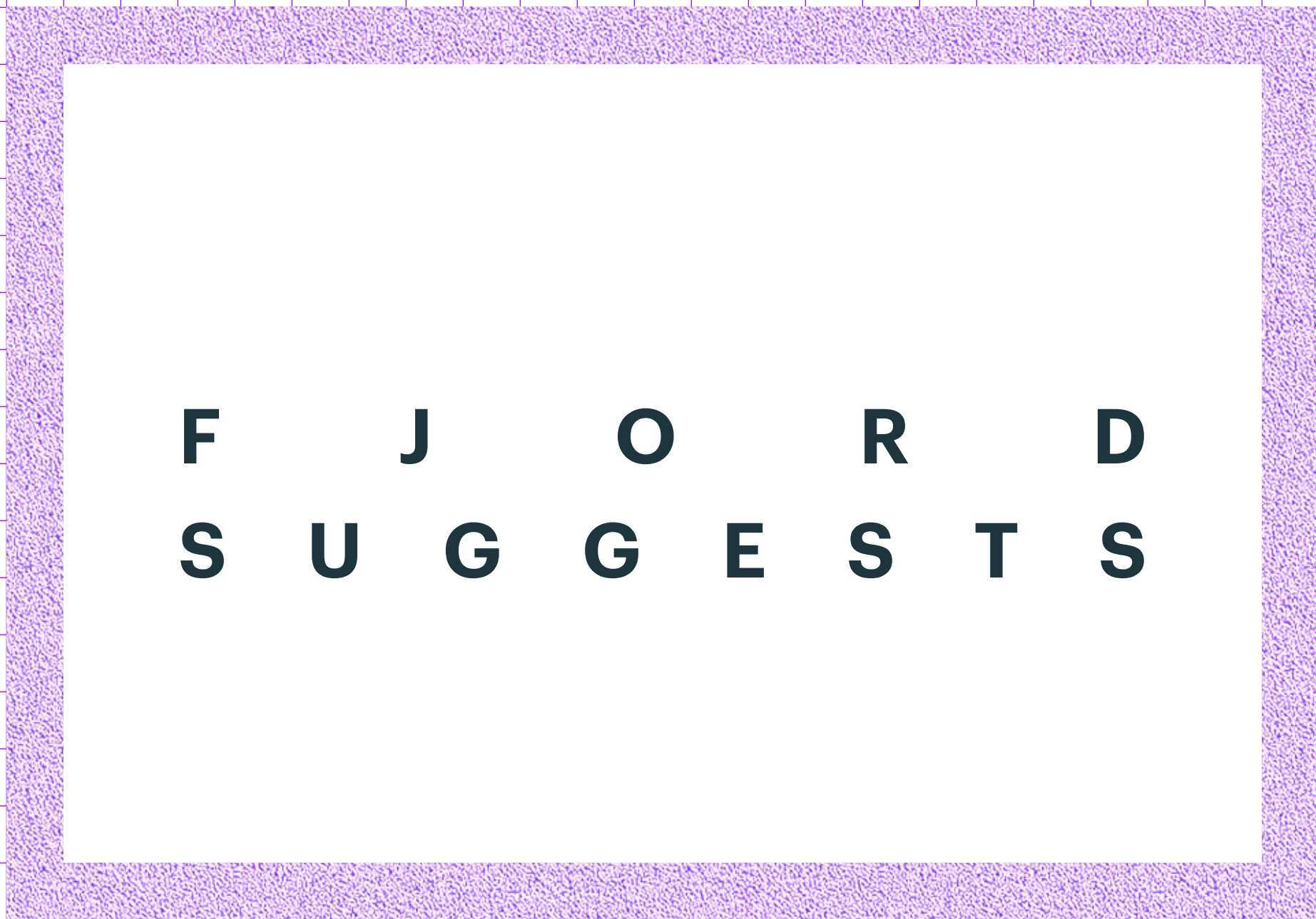
In Asia, ecommerce platform NuORDER has launched a virtual showroom for brands to showcase their products through an immersive online experience. Amazon has launched virtual sightseeing through its Amazon Explore platform. Chinese electrical vehicle maker NIO has embraced live streaming having used it to drive sales while dealerships were closed.

The marketing industry has found itself in a difficult position, managing the visibility challenge at the same time as navigating changes in advertising technology from Big Tech. In early 2021, Apple plans to make changes to their operating system, which could change the way mobile advertisers track people's internet use.

Amazon Explore makes it possible to book interactive experiences with spontaneous shopping opportunities tied in.

Almost overnight, huge numbers of people started living very differently, which changed their opportunities to stumble upon new things and to enjoy much of what was familiar. The brands on the other side of that equation need to seek new ways to interact with people from a distance, and to offer them experiences that appeal in their new circumstances. Texture, transparency and control are essential to reaching, communicating and delivering a new generation of experiences. Brands that fully understand that will be most successful at achieving visibility in the new spatial and social context.

FJORD SUGGESTS

Think

The customer you knew yesterday is not the same one you have now. Continue to study the context of your customer base, because it will likely remain unstable for some time to come.

Say

Businesses have a role to play in giving people hope. Consider your brand's tone of voice in the context of what's happening right now. Choose a hopeful tone and messaging in all your communications that can vary with local context.

Do

Reimagine how you could deliver valuable physical experiences like texture, access to advice and the shelf experience. How can you encourage exploration and offer inspiration in new ways?

DO IT YOURSELF INNOVATION
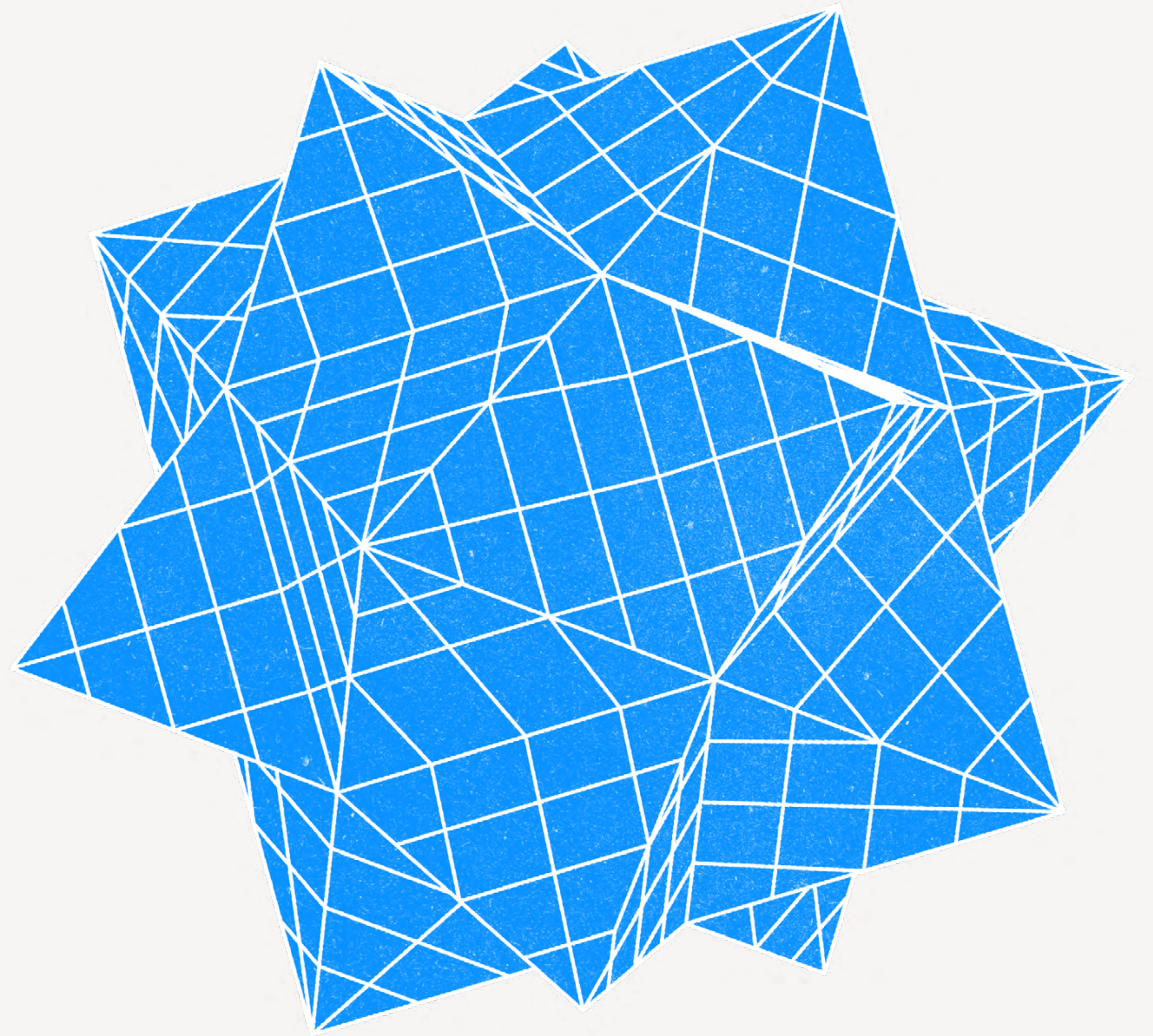
INTRODUCTION

For years, innovation has been driven by technology and devices. It still is, but now, it's also driven by people's ingenuity in challenging circumstances. There's a pressing need for organizations to rebalance their innovation approach in response — to offer tools rather than prescribe solutions, and to enable people to get more creative with how they live.

Many have seen layoffs or career uncertainty as a chance to launch their own businesses from home.

WHAT'S GOING ON?

I nnovation is changing — it's moved from devices to people. We've come to think about innovation as being wrapped up in technology, but it's increasingly being driven by people's talent for thinking of new ways to reshape their own experience of life. Of course, technology often has a role to play, but — especially since the pandemic arrived — people are now making creative use of whatever tools they have to make life a bit easier.

Ingenuity is often triggered by genuine crises — let's not forget that alongside its tragedies, World War II yielded the first programmable digital computers, as well as unexpected discoveries like Super Glue. Being stuck at home and starved of usual sources of entertainment during lockdown might very well lead to the greatest period of creativity in recent history.

The measures imposed to contain the virus turned out to be a catalyst for creativity, as people and businesses looked for new ways to solve problems brought about by restrictions. So-called "life hacks" have been a feature of life for a long time, but 2020 has amplified the trend. Consider the volume and variety of creative ways people sought to address new challenges, from the home worker using their ironing board as a standing desk to the parent-turned-teacher.

We've seen people using their creativity to reimagine their living spaces for multiple new purposes, and modify mass-produced objects to suit their changing needs. Since March, watch time for "step by step" and "for beginners" how-to videos rose 65% year on year, and searches for "DIY" were up 80%, according to Google.

Workarounds have popped up in every home for problems big and small, and people are making technology work for them to help them achieve their goals. In 2019, how likely did it seem that Zoom would become the primary vehicle for educating masses of young children around the world just months later? People's urgent problems couldn't wait for wholesale solutions, so they innovated their own fixes with whatever technology they had at hand. It'll be fascinating to see which pandemic-prompted innovations change our lives in such long-term ways.

The pandemic has awakened people's creativity and sparked a rise in entrepreneurship. Despite our uncertain future, many have been seeing this unique set of circumstances as an opportunity to start their own company. According to the UK's Centre for Entrepreneurs, almost 50% more businesses were created in June 2020 compared with the same month in 2019, and a record 81,000 businesses were registered in July.

People are using their home technology in ways they hadn't previously considered necessary — or even possible.

Businesses have been launching at the fastest rate in more than a decade, with people turning their pandemic workarounds into their careers. For instance, a keen cyclist set up Backyard Bicycles pop-up shops to tune up bikes, a sous chef launched a food delivery service, a former publicist for fitness studios launched her own online workout platform, a former communications director opened a bookstore, and a new dating app for college students called OKZoomer quickly gathered 20,000 members.

The pandemic inspired a group of Colombian engineers to build low-cost ventilators from scratch, and a high school student from Atlanta, US, to start an organization to deliver free meals to front-line hospital workers. In the UK, one innovator used a "buy one, give one" sales model to distribute "hygienehooks" that enable people to open doors without touching them.

DIY innovation has been encouraged, in part, by government living subsidies during lockdown. The US government gave those who lost their jobs because of the pandemic US$600 a week to offer some financial security and, in some cases, it's given them the space to experiment with new ways of earning money. As the economy started to reopen, America saw an explosion of new small businesses launched by laid-off workers who found gaps in the market.

The Singaporean government provided freelancers whose work had stalled with equipment and tutorials to help them find a new outlet online — it's given them the tools they need to innovate ways to generate income.

Platforms are being creatively repurposed to solve pressing problems of the moment. In Lebanon, post-lockdown and in the wake of Beirut's devastating port explosion, schools turned WhatsApp into an informal distant learning platform for students and teachers, allowing lessons to be shared using voice notes, videos and photos in group chats. With live shows on hold, Fortnite and Travis Scott partnered up to stage an in-game performance for an audience of more than 12 million. Unable to protest safely in person, some campaigners against racial injustice used video games and even dating apps.

Platforms are also being rapidly transformed as places for people to monetize their creativity. In an October article, "Influencers are the retailers of the 2020s", Vogue looked at the rise of in-the-moment shopping inspired by seeing a style from a person they trust on social media. Influencers like Aimee Song (who recently partnered with e-commerce store Revolve) are launching product lines and teaming up with retailers to sell their own products rather than promoting other brands.

On Patreon, people run subscription services, and their fans become active participants in the work they love by giving them content, community, and insight into the creative process. In March 2020, its list of paying fans jumped from 150,000 to 200,000.

Similarly to Fortnite and Travis Scott, Roblox and Lil Nas joined forces to stage an in-game performance because live shows were on hold.

Social platforms, like TikTok, have skyrocketed in popularity as an effective way to maintain or even accelerate performers' and influencers' careers.

TikTok is quickly building its equity as a career-accelerating social platform, and artists are finding ways to make the most of the opportunities it offers. Songwriters, dancers, comedians and artists have become overnight successes through seeing their songs and challenges go viral on TikTok. The fascinating plot-twist, however, is the way doctors and nurses are using the platform to reach a wider audience with messaging around mental health. For example, Zachery Dereniowski, under the handle MDMotivator, breaks down the behaviors of anxiety, isolation, depression, and hyper-consciousness so that his TikTok followers understand mental health in bite-sized, but pointed videos.

These platforms all offer similar things for people starting or running small businesses: a way to create, and a way to reach lots of people with relative ease. Similarly, ASOS Marketplace is a leading UK platform that connects independent fashion designers and small boutiques with a broad audience, which saw significant growth during lockdown. Ecommerce platform Teespring enables anyone to design, set a price and start selling, while it takes on their production and distribution. It reported Q2 sales up 97%, its fourth consecutive quarter of compound growth.

Historically, people have often been quick to adopt new digital technology and slower to adapt to what it can help them achieve. Now, in a context that is challenging us in so many ways, the adaptation cycle is accelerating, and a significant shift is happening: people are now hacking technology to help them with their displaced lives, rather than adapting their lives around the latest technological advances.

66
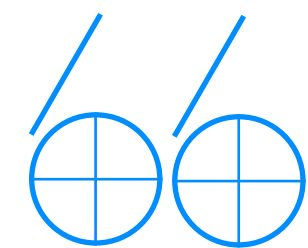
Demand for online tutorials and how-to videos rose dramatically from March 2020, with Google reporting a 65% increase in watch time for "step by step" and "for beginnners" videos.
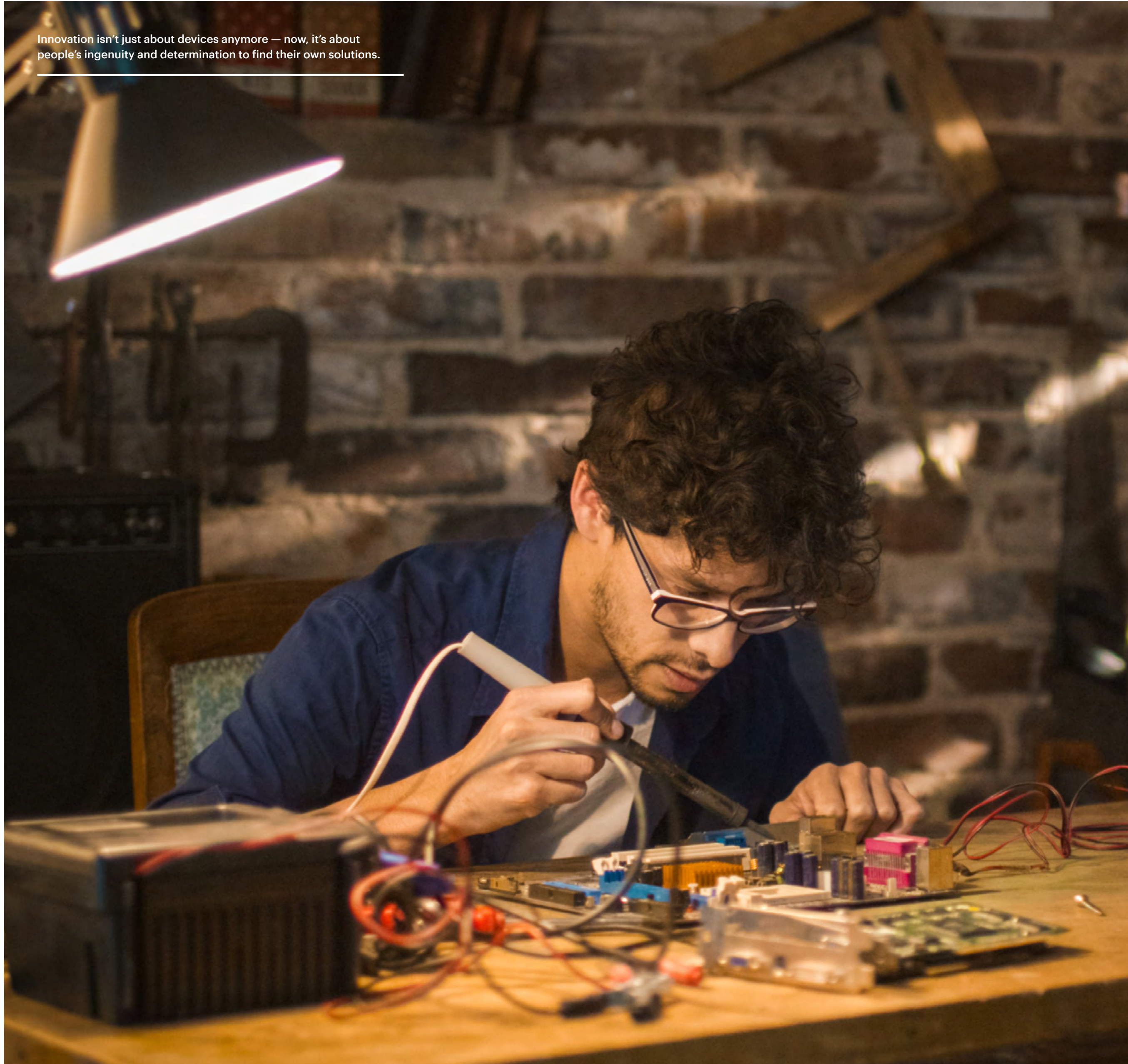
Innovation isn't just about devices anymore — now, it's about people's ingenuity and determination to find their own solutions.

WHAT'S NEXT
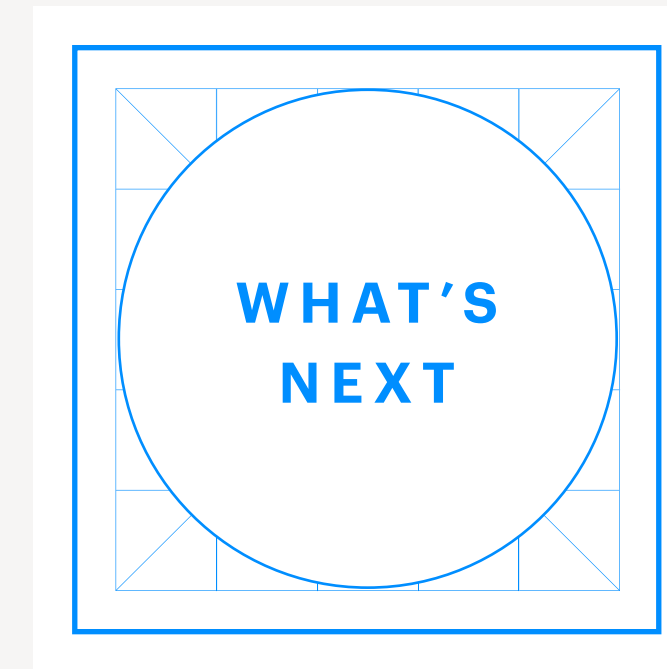
O rganizations must adapt to the fact that people are innovating for themselves. They must acknowledge how the lines between innovation and creation and between creator and customer have blurred. As Microsoft Chief Executive Satya Nadella has suggested, they must think of innovation not as something that is either "on" or "off" but as a set of dials to be gently tweaked (then tweaked again as things change). For instance, if/when a vaccine proves widely successful, how will people's innovative goals change?

Everyone wants better solutions, but the era in which a brand was expected to create a finished solution has gone. It's time for new thinking and new approaches, and perhaps the most important switch is that from prescriptive innovation to suggestive innovation.

In the design industry, we have long evangelized about the virtues of cocreating with people to achieve the best possible products and services, and it's certainly proven to be a solid system. Now, however, organizations would be well advised to start thinking of cocreation as an output — to start designing tools and platforms to enable people to create for themselves.

Roblox is growing fast, enabling people to design and trade digital fashion items.

Creative teams must take an ecosystem approach to design and build platforms on which third parties can build other products and services. Platforms come in an array of guises — an obvious example is a service like Shopify, which provides small and medium-sized businesses a way to sell to customers. In 2020, it surpassed spending on eBay for the first time, thanks to the rise both in people shopping online, and in independent businesses wanting to use the platform to reach those people during lockdown.

Nike's personalized footwear proposition Nike By You is a platform that lets people tailor their own perfect shoe. The adidas MakerLab enables third-party designers to bring their creations directly to market. Meanwhile, social gaming platform Roblox is growing fast, letting players design, buy and sell digital fashion items.

As part of their drive to start thinking of people as cocreators, brands will need to reframe their own role in the relationship from sole fixer with all the answers to collaborative enabler. They'll need to think of cocreation not just as part of the design process but as an output that enables people to shape technology around their goals.

Companies like Indian startup, cure.fit, launched digital fitness sessions in lockdown and uncovered new demand they hadn't considered before. Fly London did similar, offering free IGTV workouts that proved an appetite for a regular service. A word of caution, though: any innovation likely to distance people from the source of expertise will need to minimize the risk that people become anxious or overwhelmed by the tasks they can now perform themselves. Brands must also find the right balance between convenience, accessibility and privacy.

In healthcare, necessity has been driving both innovation and adoption in 2020. With virtual appointments and medical tests being administered at home, healthcare is no longer something that happens to people — it's now something in which they play an active role. The demographic in most frequent need of healthcare services is the elderly, so inclusive, accessible design is paramount. Everyone should have the opportunity to use innovations to shape their own personal healthcare programs.

We will undoubtedly see more examples of platforms that enable people to innovate around their health in daily life, like Singaporean telemedicine platform, MyDoc, which saw active daily users rise 60% in February, then double in March. In South Africa, platforms like Vula virtually refers patients in remote, rural areas to specialists in major centers. Back in August, Amazon launched a trial of its Amazon Pharmacy online pharmacy business in India, offering prescriptions, traditional Ayurveda and

Amazon Pharmacy simplifies the prescription fulfilment experience. It enables customers to add their insurance information, manage prescriptions, access pharmacists 24/7 and choose payment options entirely though a secure pharmacy profile.

Healthcare has seen huge advances in innovation, like Vula, which helps people in remote areas of South Africa.

over-the-counter. Since then, Amazon has brought the same offer to their US customers, and has made medications more accessible by offering Prime members savings when paying for them without insurance.
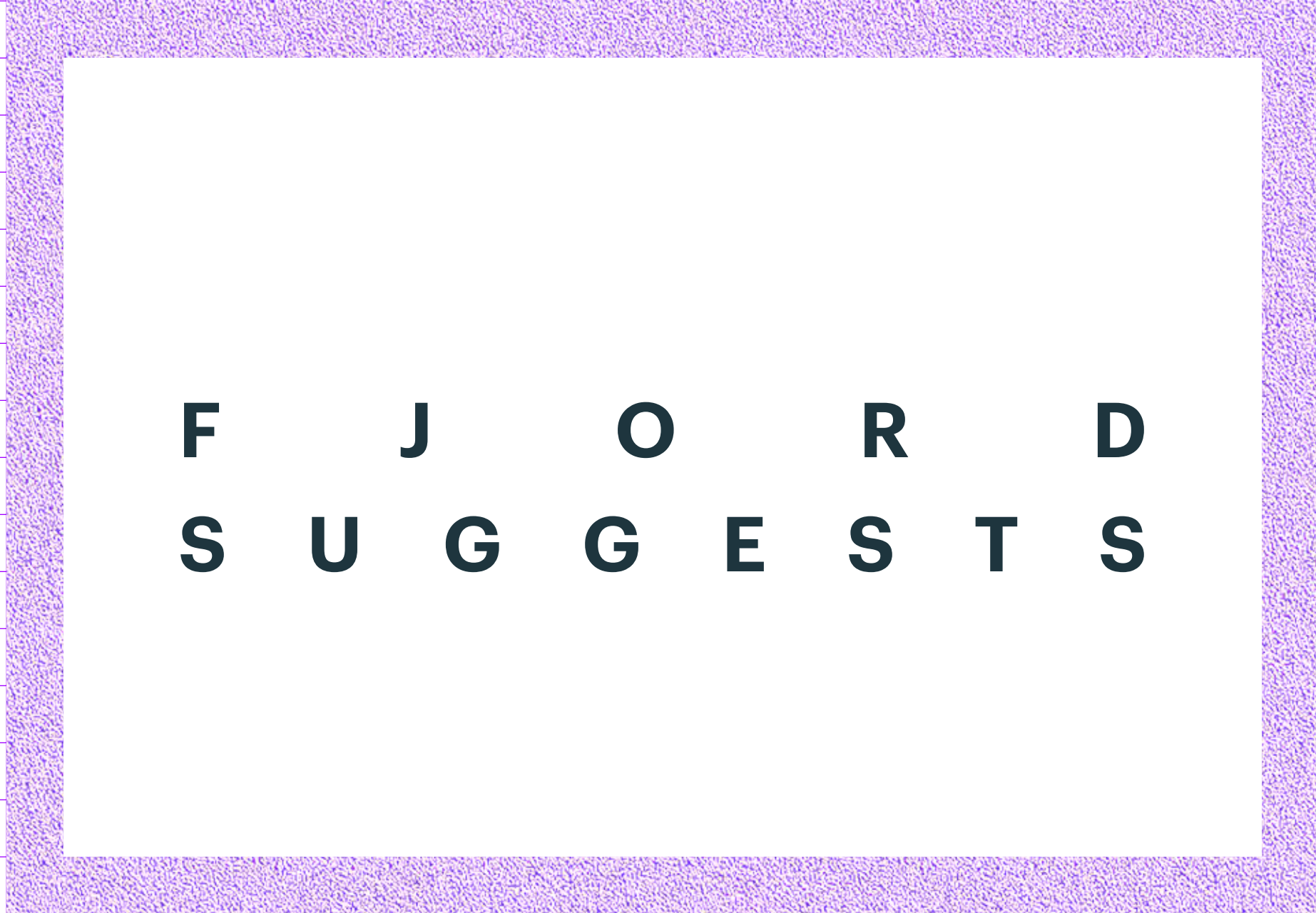
Corporate innovation is not just about ideas, as you need stamina, courage, alignment, and leadership to see it through often iterating over a long period of time for new inventions. Companies we currently look to for inspiration — such as Airbnb or Uber — are often ex-startups, but their stellar success didn't happen overnight. It takes a long time to transform from startup to unicorn and, in large organizations, it takes a long time for an idea with promise to gain traction at scale — plus, in the end, the result usually looks completely different from the original notion.

Organizations are beginning to realize that time and stamina are key requirements to innovate — but focusing on enabling people's creativity is quicker.

Another factor common to companies we admire is an ability to think beyond the obvious, the immediate and the present. As digital analyst Ben Evans observed in his newsletter, while the first 50 years of the car industry were about making car companies, the second 50 were about McDonalds and Walmart — in other words, what changed once everyone had a car?

An old approach to innovation would be to ask: What follows the smart-phone? At this point in time, who cares? From now on, every organization should build a new question into their innovation process: What other things could people do with this?

FJORD SUGGESTS

Think

Shift your mindset from customers to cocreators. Consider your products and services as "unfinished"—ask what elements of your experience could be cocreated as an output and if it could increase the circularity of your business model?

Say

Innovation is a long game. We commit to it. Create innovation habits and rituals that quickly become ingrained. Stamina matters in innovation.

Do

Create a platform and let your customers use your data to enable them to play and create—with your products and services but also with others. The data you can then generate becomes very valuable.

SWEET TEAMS ARE MADE OF THIS
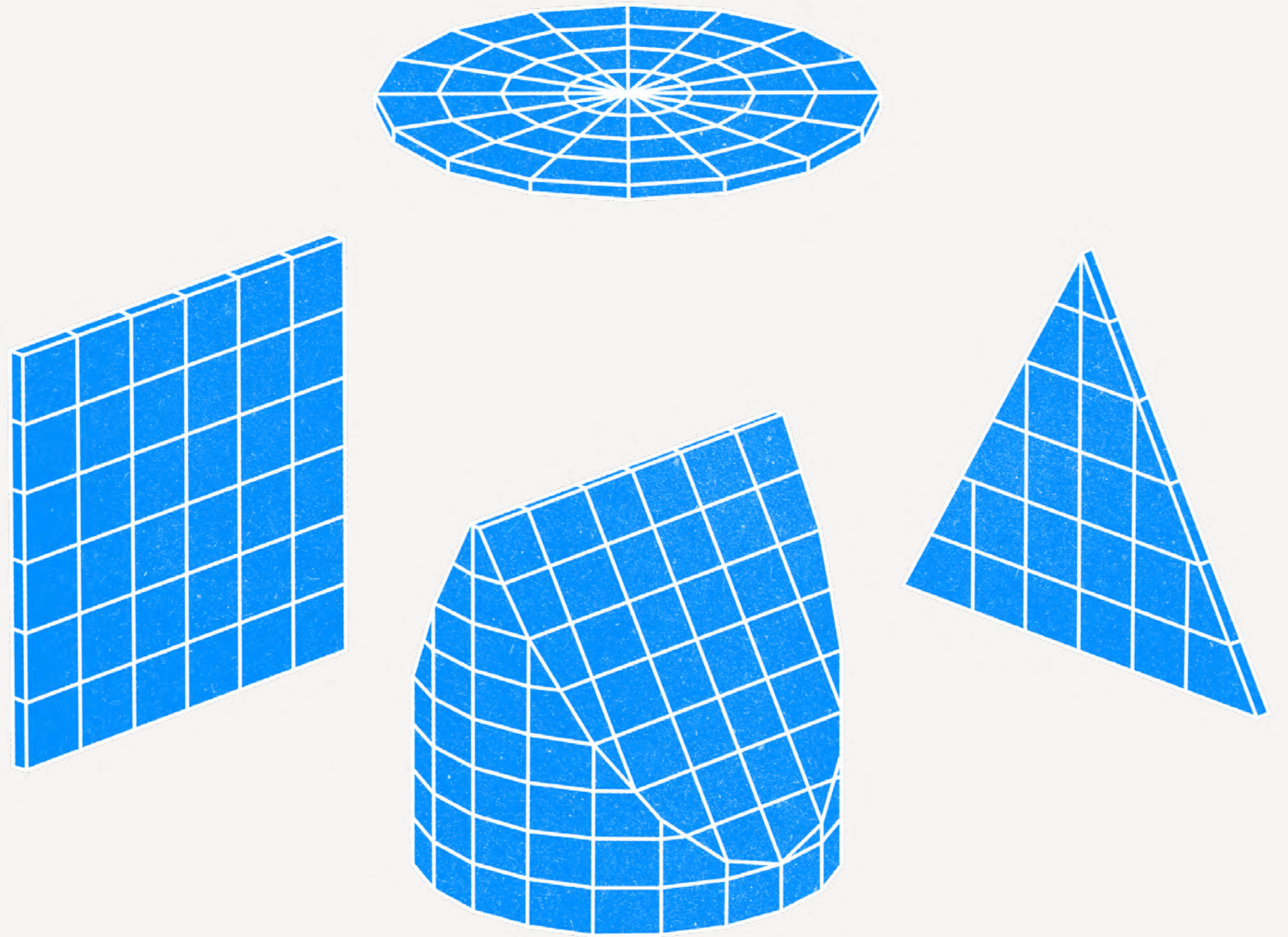
INTRODUCTION

A reframing of our relationship with work, working hours and workspace has been underway for some time, driven by technology. This shift accelerated in 2020, creating a need for organizations to rethink not just the employee experience but the reciprocal employer/employee contract.

Millions of office workers are now working at home, which effectively means they're living at the office.

WHAT'S GOING ON?

Working lives were upended this year — not just for office workers, though they are among those keenly feeling the effects. For a significant proportion of those who still have jobs, working from home has become living in the office, which is having a huge effect on the reciprocal agreement between employer and employee, and the many assumptions around it.

While employees still get paid, the peripheral value of being physically present in a workplace — social capital, knowledge transfer, soft skills and hands-on experience — has been significantly diminished. In a

remote working world, entry-level employees struggle to strengthen the kind of professional relationships that will help them develop their future careers. It's an issue that applies to any workplace where some or all work can be remote, like shops whose customer care staff can work at home while the store is closed.

Daily users of Microsoft Teams soared to more that 44 million in the early weeks of the pandemic.

Previously, we could assume that our employers would cover the cost of much of what we needed, like our desk, chair, computer and internet access. Many of us are covering these costs ourselves now that we're working at home. Meanwhile, for those with limited living space — younger workers especially — bringing the office home has caused anxiety and stress, and prompted many people to move house.

Services that facilitate remote collaboration have, predictably, seen their user numbers shoot up. Slack saw a 78% increase in companies spending more than US$1m per year. Microsoft's cloud services rocketed by 775% and daily users of Microsoft Teams soared to more than 44 million during the early weeks of the pandemic. However, in many cases, people's home hardware and infrastructure hasn't proven to be resilient enough to support long-term remote working.

The upending of work rippled across sectors. Numerous non-office jobs depend on offices, ranging from servicing roles — security guards and cleaners, for example — to workers in cafes and restaurants, retailers and gyms. The longer offices remain closed, the less likely that any of the jobs servicing those offices (and the people who once worked in them) will be needed.

The office as a place of work is not dead, but different organizations are now rethinking it. On one end of the scale, many workers who crave a return to the office may find their hopes dashed as economic pressures could see companies downscaling their offices to cut costs.

Countries whose governments have had reasonable success with infection control have seen higher rates of people wanting to return to their workplaces. In August, 83% of office staff in France and 76% in Italy had resumed their commutes. (At the time of writing in November 2020, the second wave had brought these numbers down dramatically.)

At the other end are leaders like Netflix CEO Reed Hastings, who has asserted that "not being able to get together ... is a pure negative". Some predict employers may soon face pressure from local governments to

bring workers back to the office to restart the local business infrastruc-ture around it and the wider economy — irrespective of what those employers want.

The future won't likely be one-size-fits-all — in fact, it's possible that the employee experience will look different for every organization. In one global survey, three quarters of workers said they want a mix of office and remote working to become the new norm, with a half-and-half split seen as the ideal balance.

As employees reassess what they value most in employment, the down-sides of working from home, and alternative methods of remote working, employers are under pressure to rethink the employee experience.

The notion of the office as a workplace has been thrown into question, with many companies reassessing their operations.
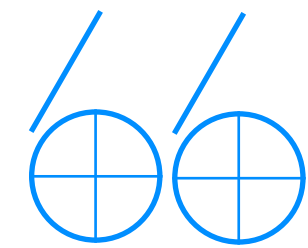
> Working at home comes with features and challenges that companies will need to work through with their employees. How might we reimagine the employee experience in 2021?
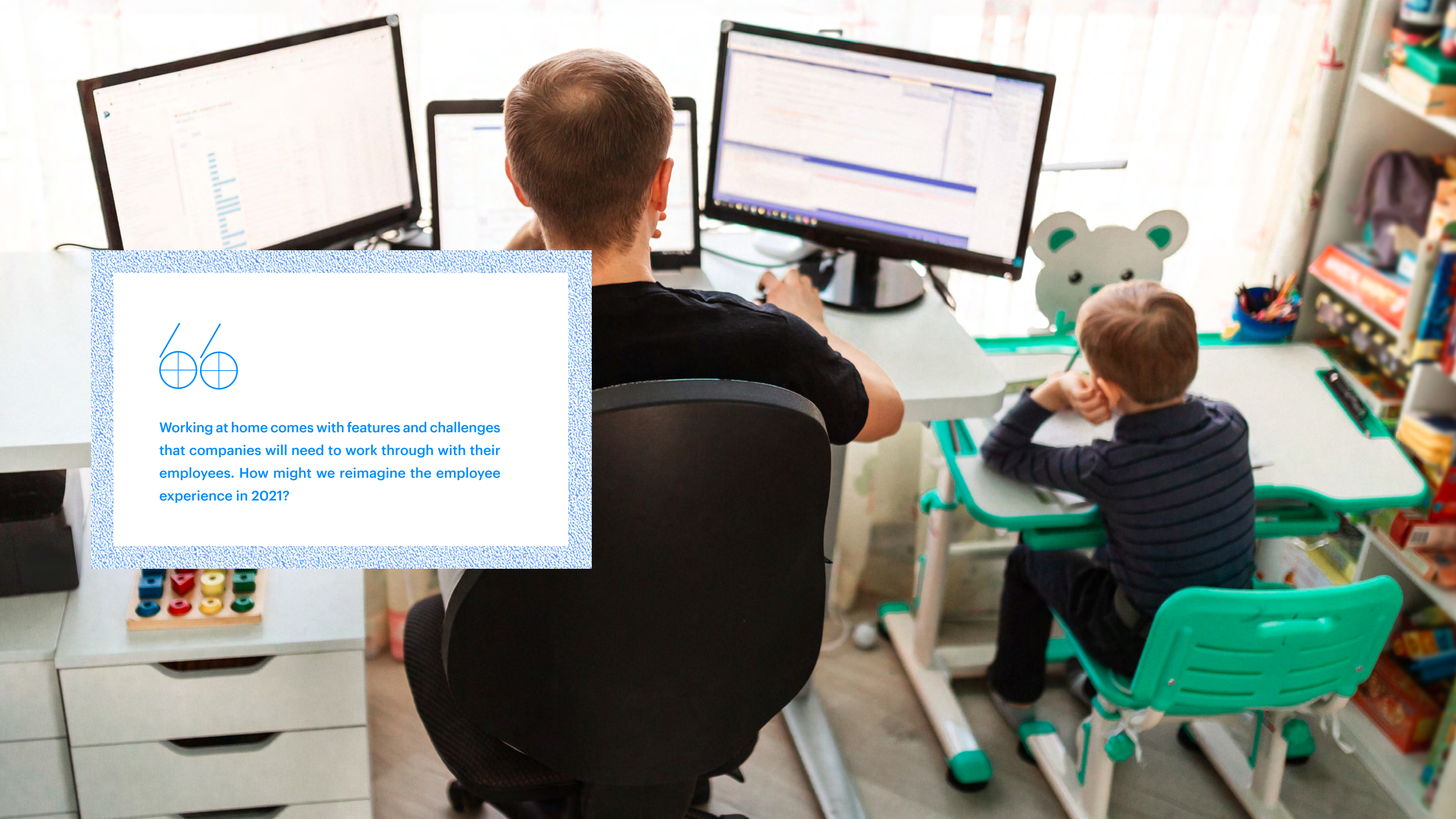
Companies are starting to blend home and office environments using virtual reality. Facebook's Infinite Office is an example of this.

WHAT'S NEXT

E mployers must adapt to the fact that "workplace" has now become less to do with a physical space and more a mindset, supported by technology. Though it's too early to know what the new workplace will look like, there are opportunities for employers to innovate in four main areas:

Technology

Device innovation has been at a standstill for many years, but home working might trigger a watershed moment that generates a breakthrough as technologically significant as the iPod, because many organizations that kept digital transformation at arm's length have been forced to embrace it. "We say we've seen two years of digital transformation in two months as a result of Covid," said Fiona Carney, chief marketing and operations officer at Microsoft Asia Pacific.

Interface design tool, Figma, was developed to make remote collaboration easy.
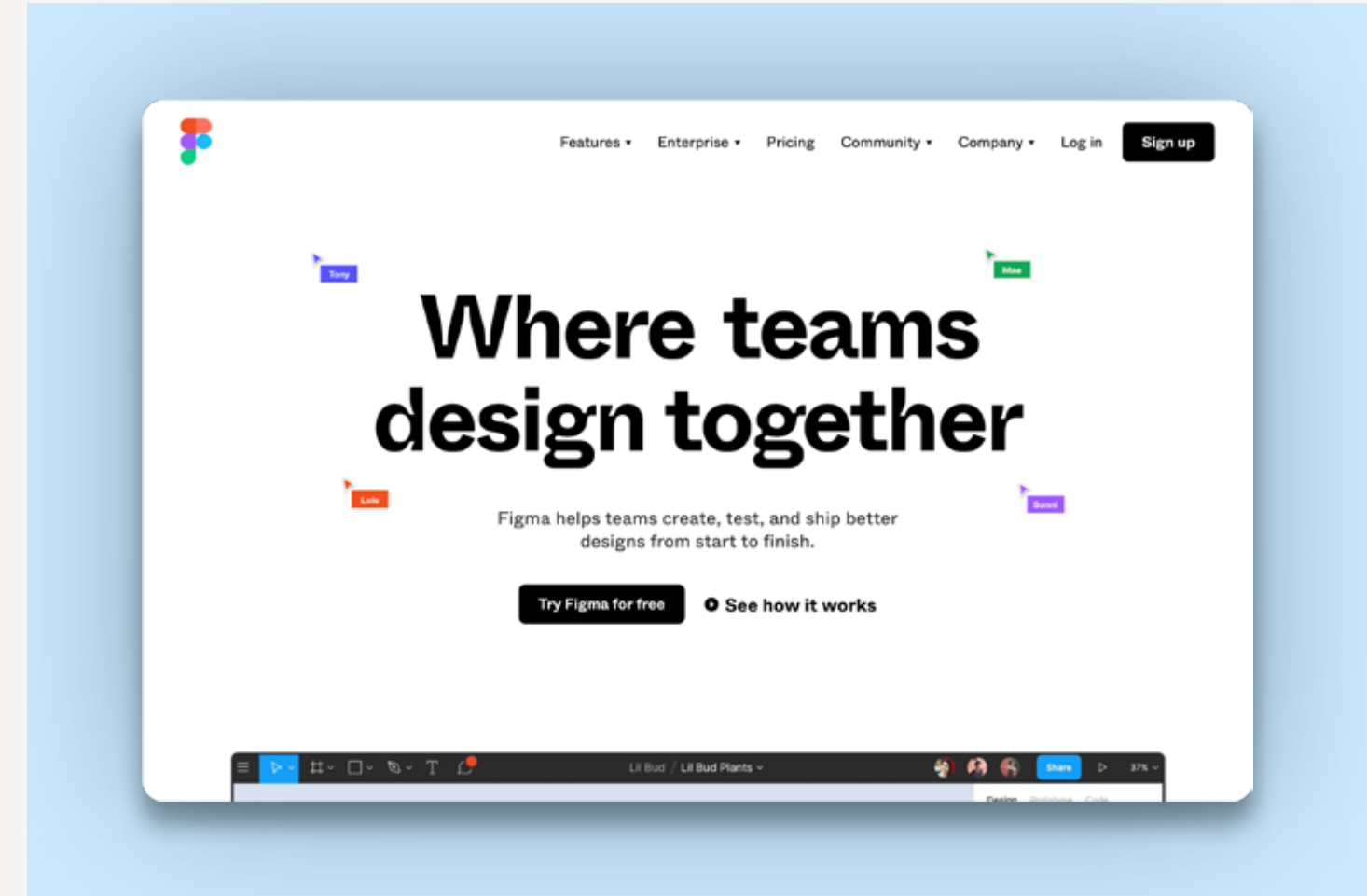

Video calls quickly became a standard feature in people's lives in 2020. We're already seeing new solutions emerging to improve the experience for employees who have brought the office home.

Already, we're seeing companies repurpose existing tools and new solutions are now emerging. Google's new videoconferencing hardware, Google Meet Series One, includes background noise cancellation and AI software to pan a camera on whoever's speaking. Facebook's new Infinite Office platform is a VR working environment that integrates home workspaces with real office environments.

Soon, hardware and software that revolutionize the experience of working from home and transforms interactions among dispersed teams will be commonplace, led by interface design tools like Figma, which was developed for remote collaboration. Until now, technology to support home working has been outside the employee value proposition, but that's changing fast. Those companies that invest in it sooner can gain clear competitive edge with talented prospective candidates.

Culture

When aligned with strategy and leadership, a strong culture is the key driver of business success, but everything we know about building it is based on people being physically together. We now have new and pressing challenges around how best to create, maintain and evolve a culture when workforces are physically apart. Whether maintaining a work culture or building one from scratch, employers will need new approaches specifically tailored to virtual teams.

Initially, we rightly focused on productivity as the success or failure of remote work. While we've found that most knowledge workers can be productive while working remotely, as time has passed, people have started to report a drop in their sense of belonging.

Many of the variables that make up corporate culture are not within the control of leaders to the same degree as before. They must recognize that ad hoc communications between colleagues are enormously valuable as one factor that nurtures belonging and prevents isolation. As Mike Davidson, VP at InVision (a digital product design platform) said on Twitter: "All of my best memories revolve around people, not products."

As the new employer/employee contract evolves, it'll be interesting to see whether the social interaction gained from going into a physical workspace becomes a perk that makes a job more appealing. Will daily face-to-face interactions be regarded as a premium job feature?
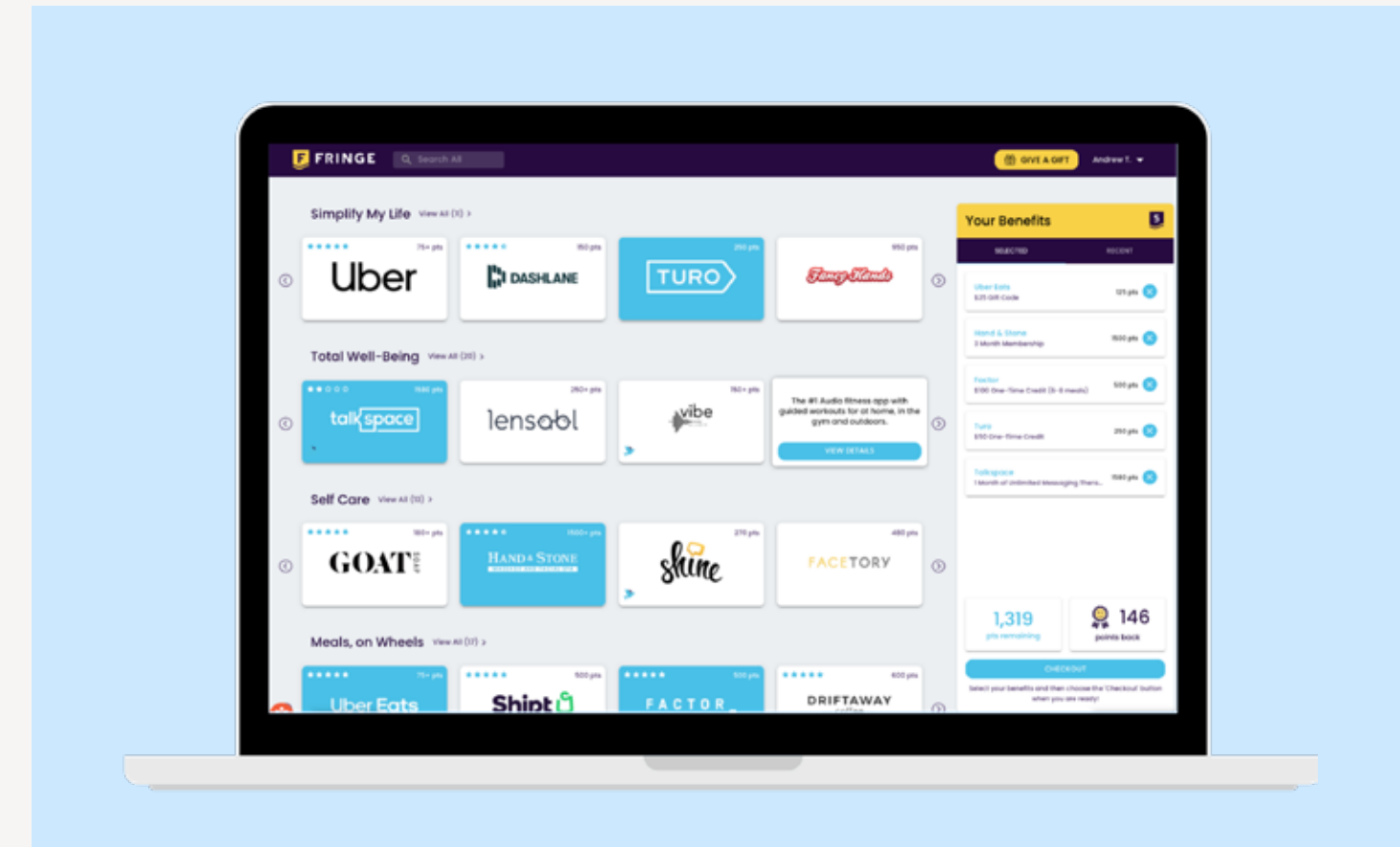
Fringe enables people to choose the employee lifestyle benefits they'd most appreciate.

Talent

There are significant opportunities to innovate around valuing and rewarding talent. Location-based pay bands will need to be reassessed, for example. Already, a number of Silicon Valley companies are offering employees the opportunity to work anywhere, if they accept that their salary may reduce in line with the changes in their costs of living — a move which has sparked debate and employer/employee tension.

In talent recruitment, many employers previously searched for people to work in a specific location, limiting their pool of candidates — with remote working, they can cast the net wider. This naturally increases competition among candidates, but the flipside of the same coin is that candidates are also able to be choosier about who they want to work for.

When New York-based non-profit, Fractured Atlas, switched to remote working, they stopped recruiting employees for a specific location. Not only could they suddenly choose from a broader talent pool, but they

realized the move improved their drive for equality, as their recruitment practice no longer incidentally favored those who can afford to live in or relocate to major hubs.

Support for home working will become part of the employee perks, with tailored care packages comprising anything from home broadband and office furniture to mindfulness and childcare or senior care support. This is likely to lead to the expansion of pick-and-choose perks services such as Fringe, a lifestyle benefits platform companies can use to enable their employees to select perks from the likes of Headspace, Netflix and Uber Eats.

Remote working has changed many elements of our working days, making us reexamine what's important to us.

Control

Monitoring people perform their assigned tasks is a growing challenge for employers as working from home becomes the norm, raising an array of questions about control — notably, how best to effect it and when it's appropriate to do so. It's an issue that cuts across a number of different aspects of work and the employer/employee contract. For instance, implementing effective cybersecurity for remote workers will be essential, but it will highlight important issues around privacy.

Sales of surveillance software to check home workers are working, (such as StaffCop and always-on webcam video monitor Sneek), boomed during lockdown — as did home-workers' hacks to avoid them — but at what cost to the employer/employee bond of trust? Furthermore, where do we draw the line on people's right to a private life in their own homes, and who should be protecting those rights?

When clients come into the equation, the issue of control becomes even more complex. How do companies ensure they can deliver their customer experience and control their brand image when both are happening in a space beyond their own walls? Put simply, if an employee is videoconferencing with a client at home, who has final say on the aesthetics of their backdrop (or even their personal appearance)?

To address the four areas we've highlighted, employers will need to redefine what it means to design "an office" — to decouple it from a physical space and turn their focus on designing ways to make best use of dispersed teams, with the right digital technology, to meet both their own business goals and their individual employees' expectations and needs. As Jennifer Christie, vice president, people, at Twitter shared in

a company blog post: "opening offices will be [Twitter's] decision, when and if our employees come back, will be theirs."

The remote work experiment has made us question the long-standing terms of what we give and what we get from our working lives. For now, the future of work is still unclear — instead, we are entering an era of prototyping what the future of work could look like. In doing so, we must be careful not to confuse the indicators of early success with a proof of long-term success.

Surveillance software designed to check up on remote workers boomed as lockdown kicked in, revealing a trust issue.

F J O R D   S U G G E S T S

Think

Consider the ethics of remote work. As you examine the changing landscape of where and how your employees engage with the company, the reciprocity lens — what you give and what you take — must be central to your thinking. Acknowledge that each employee's home is still their personal space and that their privacy and freedom is important.

Say

Articulate which parts of the home-working mindset you want your employees to bring back to the office, such as dress code, working day flexibility or measuring productivity by output rather than time spent at their desk. Vice versa, too: what is usual at work that should also be present at home?

Do

Design your technology-plus-culture solution for flexible working and resilience.

INTER
ACTION
WANDER
LUST
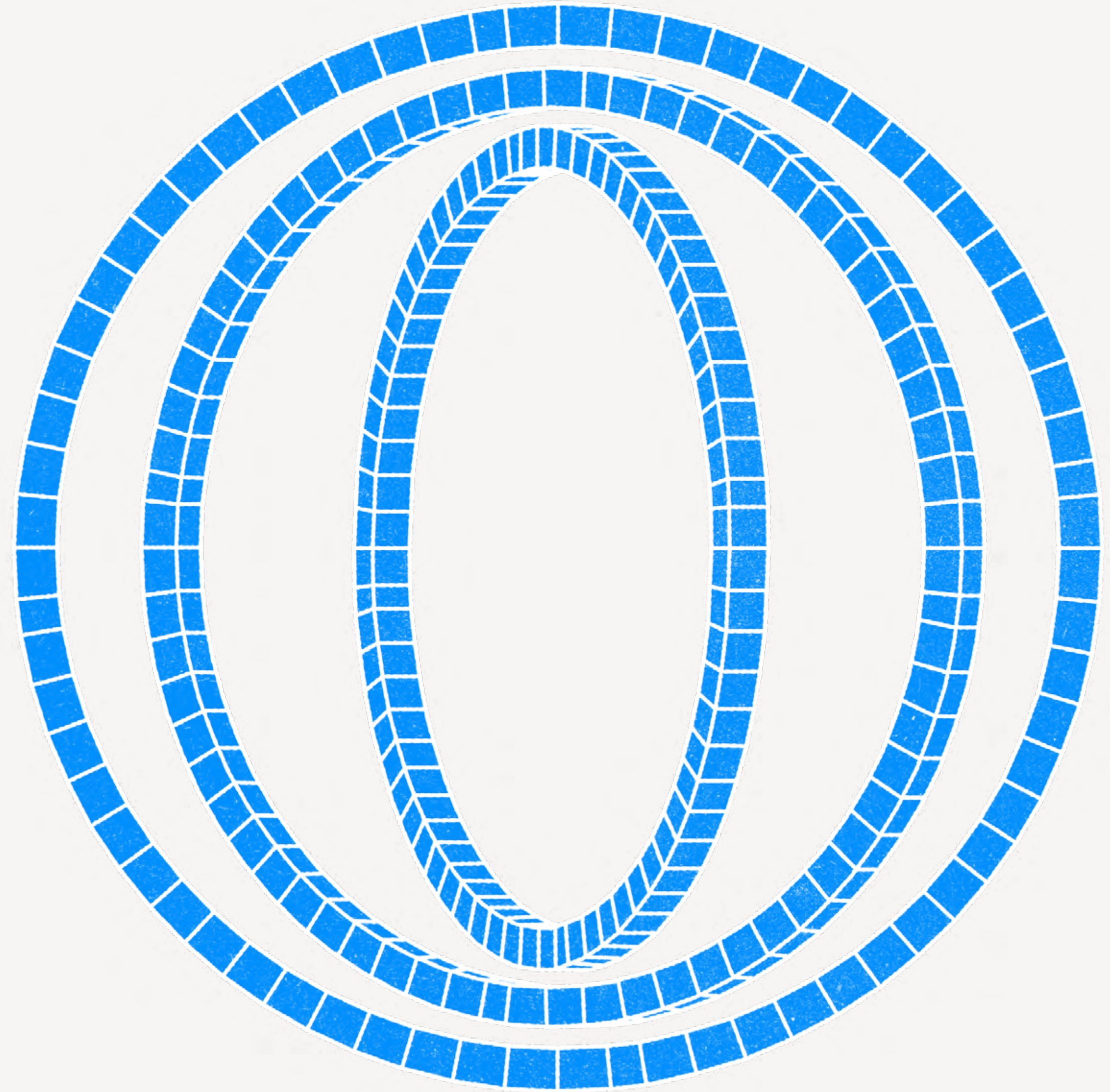
INTRODUCTION

The vast majority of us have been spending much more time on screens to interact with the world — and even with our neighbors. Consequently, people have noticed a certain sameness caused by templated design in digital. Organizations should reconsider design, content, audience and the interaction between them to inject greater excitement, joy and serendipity into screen experiences.

WHAT'S GOING ON?

The interaction between design, content and audience is changing — it has been for a long time, and now it's happening faster. In 2020, we quickly got used to video calls with colleagues, Zoom social events, attending live concerts, theatre, conferences from home. The screen became both our window on the world and our stage.

While the importance of home screens has risen sharply, our willingness to use shared screens in public spaces has plummeted — a major reversal of a former trend. Until we have a reliable vaccine, touch as a form of

Ultraleap makes it possible to use touchscreens with gestures alone, eliminating potential bacteria transfer.

interaction is in trouble and various companies are accelerating their efforts to develop alternatives. Even before the pandemic, proximity interactions were becoming contactless and self-service checkouts automatically scanned items placed close by.

Amazon has been at the forefront of touchless technology, licensing checkout-free technology to retailers. In Amazon Go stores, it launched Amazon One — a system that allows shoppers to pay by holding their hand over a scanner. Meanwhile, US company Ultraleap has developed software that updates touchscreen interfaces to accommodate touchless gesture control and, in China, Alibaba is opening unmanned supermarkets in hospitals.

From "dark stores" to curbside pickups, Amazon and Whole Foods added a variety of ways of getting groceries to customers during the trialling times in 2020.

With the falling cost and rising quality of cameras and editing tools, professional and amateur content producers began meeting in the middle and influencing each other, creating new standards of aesthetics. We had already grown familiar with using screens and the variety and quality of content they delivered. We'd also become comfortable with user-generated and cocreated content — as epitomized by the phenomenal rise of TikTok, which now has 100m active users in the US, the same again in Europe and 600m in China.

Design for screens has been dominated — and constrained — by leading operating systems for the past 25 years, and in some cases, restricting creativity. It's also led to commoditization, which, in turn, has limited people's expectations of how they experience things online. Today, anyone can launch a decent website using standard templates and simple tools at minimal cost. The existence of user interface (UI) kits, the standardization of design languages and the use of robot design systems mean that UI design is also fast becoming monotonous.

This lack of innovation has made our increased use of screens a chore. Screen fatigue is the result of a lack of non-verbal signals and an over-reliance on verbal information increasing our cognitive load, which makes online meetings more tiring than face-to-face. In response, for example, a number of design companies have reimagined the interactions on Zoom in an attempt to identify solutions that would make it better.

Before the pandemic, the way we used devices was often decided by our location and, as we moved around more, we interacted with a variety of screens. 2020 has mostly limited us to the screens we have at home, reducing our peripheral vision and restricting our field of reference. No longer do we glimpse the surprising or unexpected

from the corner of our eye. As a result — like someone who can only read about what it would feel like to have the sun on their skin — our experience has been limited.

People may want to be challenged and inspired by what they see on screen, and brands wanting to meet this demand will need to rethink their approach. They should revise their design, content, audience, the interactions between these three, and the experiences they create. If they can deliver new screen interactions that offer people greater excitement, joy and serendipity, they can leave people feeling replenished and enriched.
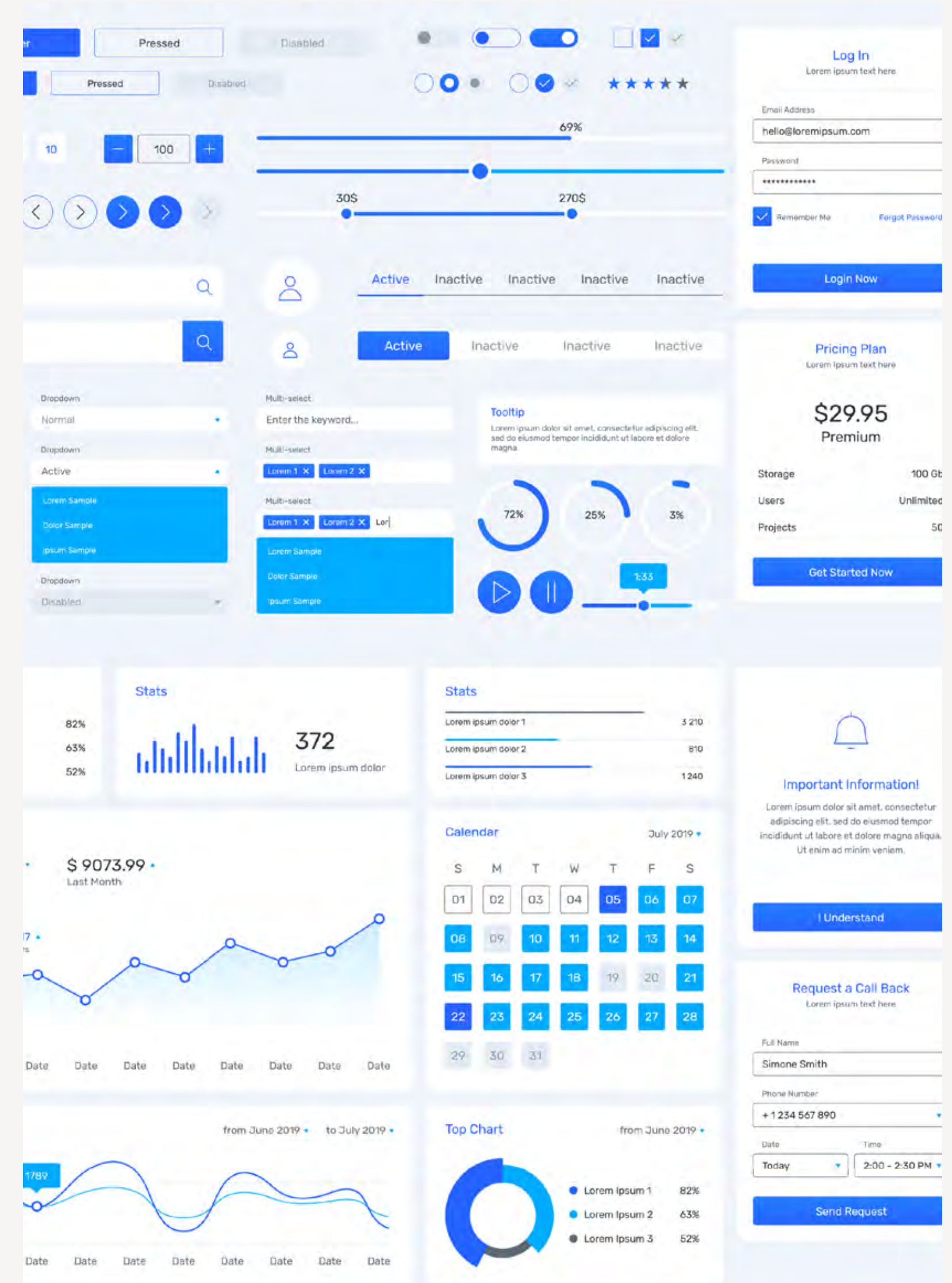
Design teams will need to break free of templated design to keep screen interactions fresh and rewarding.
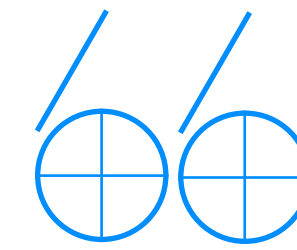
Amazon has been at the forefront of touchless technology, licensing checkout-free technology to retailers. In Amazon Go stores, it launched Amazon One — a system that allows shoppers to pay by holding their hand over a scanner.

WHAT'S NEXT

At a time when people are hungrier than ever for creative content and new interactions, brands that break free from outdated norms and restrictive design templates will be the ones that achieve differentiation. With the right screen content delivered through great design, an audience can find an on-screen experience just as (if not more) compelling than something they do in the real world.

Companies can unpack this opportunity in a number of ways. Entertainment is a powerful source of creative inspiration, as it's about delivering experiences in new environments. We've seen significant experimentation

Zwift makes home workouts fun by connecting cyclists around the world for social group rides.

Music promoter Bandsintown even partnered with gaming platform Twitch to boost performers' online earnings through paid subscriptions and tips — just one fascinating example of a new flavor of partnership, which seeks to mitigate lost earnings from canceled physical shows.

A powerful example is award-winning virtual reality (VR) fitness app Supernatural, which combines rhythm games, fitness regimens, and mindfulness to enable people to work out in an addictive VR world. For the next few years, we expect focus for many to be on opportunities to do this around streaming and video calls.

In a proactive response to lockdown, German asset manager DWS hosted their flagship investment roadshow online in April 2020. It now plans to continue online after the virtual event attracted record numbers of participants.

around using gaming platforms, social platforms and mixed reality environments as a stage for third-party content, which presents an opportunity to reinvent audience participation.

We've seen a 47% rise in use of Discord, a platform that enables clubs, gaming groups, the art community and groups of friends to get together. Once seen as a place for gamers to connect, Discord is now positioned as a place to hang out with your friends — a very powerful thing, especially during the pandemic. Friend groups or people with shared interests can join listening parties with a Spotify plug-in, live-stream video content from Twitch and YouTube, and enjoy spending time together without ads and algorithms running the platform.

Moving forward, live performance, socializing and platforms will continue to blend, and existing platforms are already getting prepared. Spotify recently added virtual events listings to its app so people can watch "live" performers via livestream. With Facebook Watch Together, you can now view video remotely in Messenger together with friends.

When India went into nationwide lockdown, event discovery and ticketing platform GoParties pivoted and rebranded as a digital entertainment platform called BoxEngage. Content creators can make short and long recorded videos, use the livestream option, and celebrities and influencers can host private sessions with followers. With more than a million users on board, the platform saw 70-80% organic growth and plans to launch an app soon.

Companies can also innovate by redesigning audience participation to more effectively draw audiences into an experience — as viewers or active participants, as creators or cocreators. Mmhmm, a virtual presentation company launched to make virtual meetings more fun, recently raised a staggering US$31 million pre-launch, which is a powerful illustration of the scope there is to reinvent.

When redesigning participation, companies might need to consider if and how best to tier different levels of involvement to maximize impact. That might mean offering people the choice between live in-person participation, active online participation and inactive online viewing, for example. Finding new ways to translate and recreate offline emotions in online environments could also be important.

Finland's national May celebrations were transformed from the traditional public events and sent online, with one event hinting at the enormous potential for virtual tourism. Rap duo JVG performed live at Helsinki's Senate Square to 150,000 people all joining from home, and enjoying tech that enabled them to dress up their avatar and let it respond to the performance with gestures and emojis.

The Genius Live show, which was simulcast for free on YouTube Live, Instagram Live, Facebook Live and Twitch, enabled fans to vote in advance on the set list. Fans who wanted a more involved experience could pay US$10 to join a closed Zoom watch party, US$100 to request a shout-out during the show, and US$200 to ask the artist a question. Both the shout-out and question features sold out during the show, and "the private watch party option was the breakout hit feature of the night," a Genius Live executive said.

Finnish rap duo JVG performed live to 150,000 people online, who could engage with gestures and emojis.

President-elect Joe Biden and US representative for New York's 14th congressional district Alexandria Ocasio-Cortez have been using Animal Crossing to meet voters and make random house calls to players' virtual islands. MTV hosting its annual Video Music Awards in August in a virtual New York City is another example.
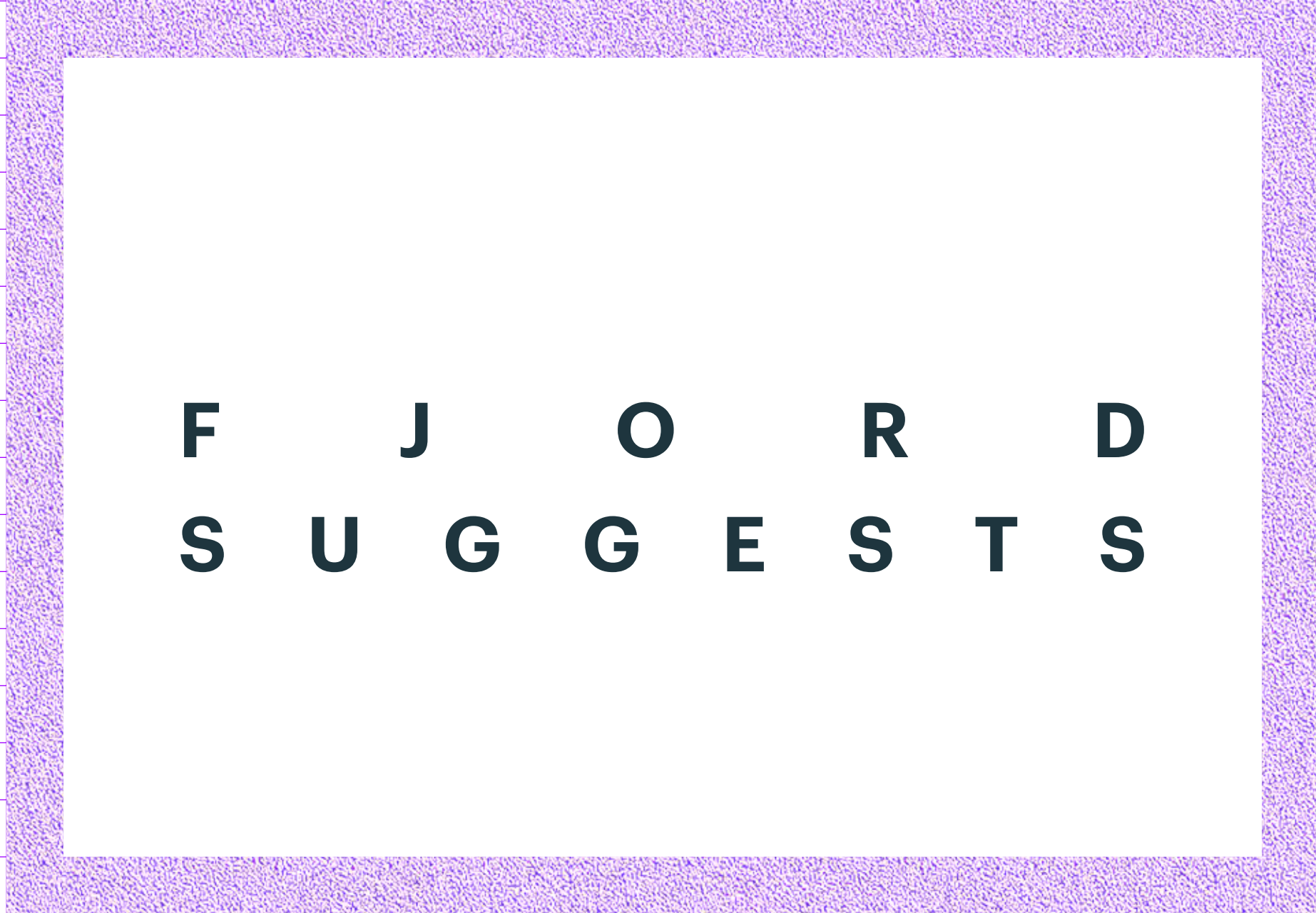

Reducing the environmental impact of our designs, and the systems and cloud-based data centers that power them, will be paramount in 2021 — and beyond.

Designers will be expected to build on a low CO2 data infrastructure, by encouraging the use of software that doesn't contribute to the growing carbon footprint and by making it integral to sustainability efforts. This involves reassessing the way their projects are designed, developed and deployed, and rethinking the way cloud-based data centers operate.

The way we interact with our devices is rapidly evolving in response to our circumstances. Our greater-than-ever reliance on screens and new caution about touching things we don't own are difficult realities for brands to reconcile, made more complex by the need to make digital solutions that are instinctive to use but feel new and compelling. Those likely to flourish will be the ones that make new use of platforms, take an ecologically conscious approach, and embrace fun and experimentation in their product development. In short, the question is: how best can we reduce the environmental impact of our designs, while successfully creating lush, engaging on-screen interactions?

It will be essential for brands to optimize these trends responsibly. The additional volumes of data generated by the increased amount of time we spend online will need to be meticulously managed, and there will also be opportunity for those brands people trust enough to do something meaningful with it.

FJORD SUGGESTS

Think

Look at the tension between health and constant digital immersion. Find the balance — for customers and employees — between being as immersive as possible versus a broader palette of stimuli.

Say

Say you'll take risks with creativity in interface and communications — and mean it. Don't drown in the sea of sameness.

Do

Explore new entertainment platforms and aesthetics to understand what you could do to broaden engagement.

LIQUID INFRA STRUCTURE
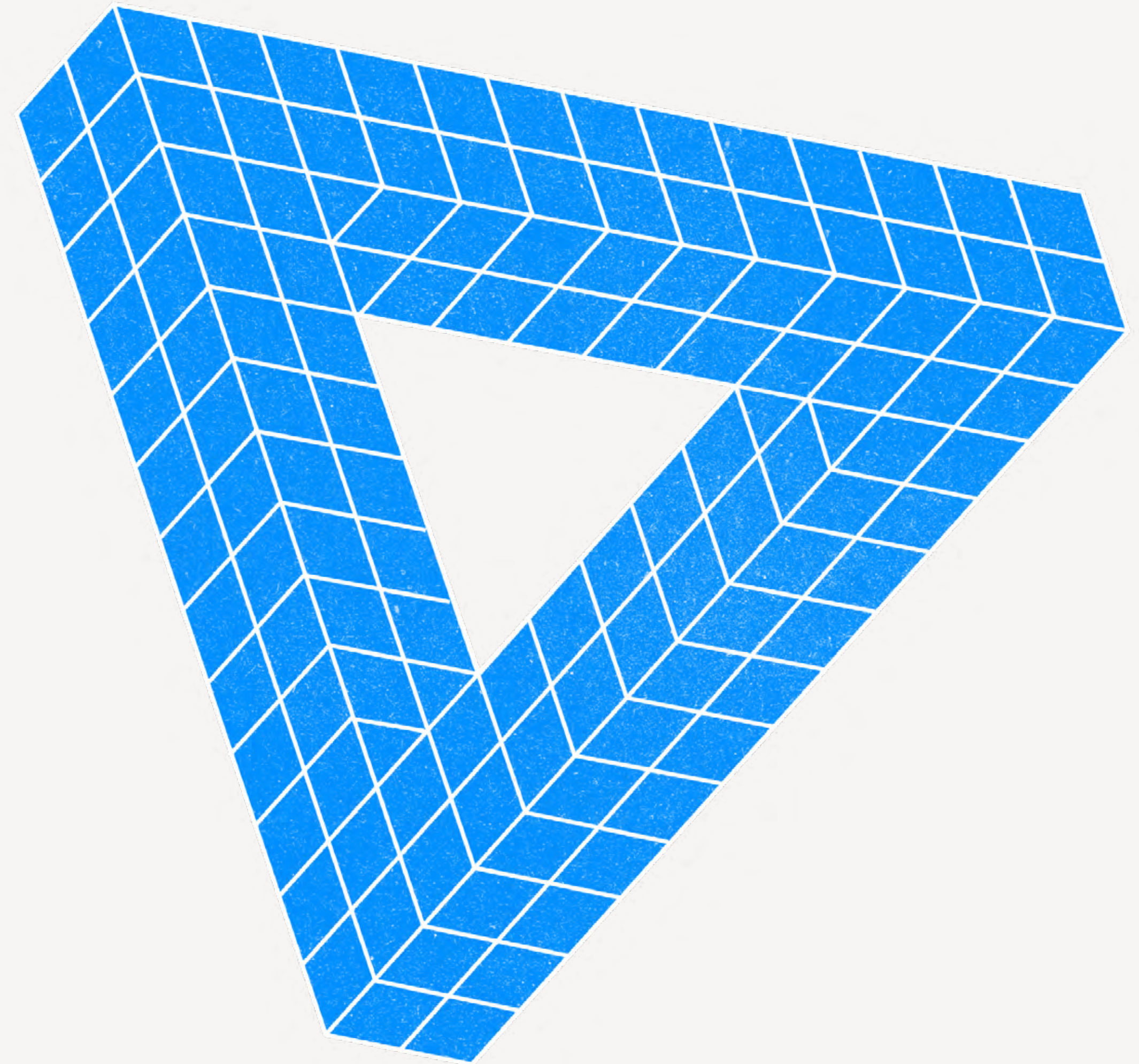
INTRODUCTION

How people experience and get hold of products and services was changed in 2020 by collective displacement. Now, supply chains are under unprecedented pressure in recent history to meet new demands, placing stress on business models. Organizations should rethink their physical assets and refocus on points of delight in the last few feet before purchase.

The way we get hold of things changed in 2020, and it's becoming more important to deliver joy right through to the last moment.

WHAT'S GOING ON?

How and where we get things changed a lot in 2020. People started spending more time and money shopping online and in their neighborhood so they could support local businesses while avoiding travel, prioritizing purpose and their communities where possible over the convenience of ordering from an ecommerce giant.

With fewer people going in person to physical shops, city hubs dwindled — as did physical retailers' volume efficiencies. As a result, businesses have had to urgently reshape how they manufacture, ship, store and deliver as well as question the role shops and other assets — in hospitality, for example, restaurants and kitchens — can and should play in the future.

Kraft Heinz and PepsiCo were among those that sought to expand their approach and their supply pipeline — by selling Direct-to-Consumer (DTC), enabling them both to get their products to customers quickly, and to offer data-driven product bundles that prompt people to buy more. In August 2020, LG launched a DTC online store in India to complement their overall channel strategy.

Kraft Heinz expanded their approach by launching a Direct-to-Consumer offering Heinz to Home, offering data-driven product bundles.

The challenge is that the DTC model might not scale well. Home delivery is costly, adding to the squeeze on brand profits, and customers have neither the time nor desire to manage one-to-one relationships with all the brands with which they do business.

Cost-to-serve went up dramatically in the past year, sharpening the ongoing trade-off between experience and cost. Retailers are dealing with vanishing volume efficiencies and the need to make big operational changes, while virus-related health and safety costs skyrocketed. When

Sephora began reopening its US stores, it invested in door greeters who offered each customer hand sanitizer and explained new in-store rules, such as no touching the samples — however, that's often the main reason why people visit the store in person.

Then there's the hidden human cost in the form of anxiety and stress about the risk that workers like delivery drivers are exposed to, especially if they feel inadequately protected.

As our *Collective displacement* trend shows, home has become the new store front, creating important visibility issues brand owners must now address. Moreover, the home's growing importance has upped the stakes by raising people's expectations of retailers.

For a while, we've talked about "liquid expectations", which is when an exceptional experience raises customers' expectations of all others, across industries. Now, the definition has expanded to include the fact that people want the same immediate gratification and delight from a delivery experience that they took for granted in store — no matter where they are. Largely, they're being disappointed, so this is a huge opportunity space.

For instance, many of those who are moving and will move from urban to rural areas still expect city-style speed and convenience — a demand companies are starting to address. In the US, Koloni now provides small towns with micro-mobility solutions such as bikeshare schemes that until recently were only available in bigger cities.

Cost-to-serve is being driven up by people's rising expectations for delivery experiences, which includes the increased cost of return.

In the US, DTC mattress provider, Casper, had been facing one third of its mattresses returned. They addressed this challenge by opening a physical store where people could try before they buy.

New patterns in shopping behavior have cost retailers incidental spending and created new expenses. Where people used to go to the shops and come home with impulse purchases as well as items on their list, they now shop online for exactly what they need and rarely anything more. It's partially because many people's budgets are tighter, and partially because they're missing visual cues they once got from walking past one store on their way to another.

People would previously bundle shopping experiences together, meaning brands could enjoy efficiencies, and rely on a whole ecosystem of their own design and making. Now, ecosystems have become fragmented, generating extra costs including marketing, packaging, delivery, customer service and returns/restocking. Without absolute certainty on how much longer restrictions on people's movements will continue, people will carry on with a combination of in-store and at home shopping, so those retailers yet to make changes would be well advised to do so now.

Forget the last mile, now it's all about the last few feet — or even inches — of the customer experience and designing for and around it. Amazon's local shopping proposition, for example, enables customers to shop from local boutiques as well as markets worldwide, while Amazon ships and delivers their items direct to their door.

Closeness to the customer is more critical than ever. New patterns of demand are creating pressure on organizations to respond by shaping new business models and redesigning operational models and supply chain.
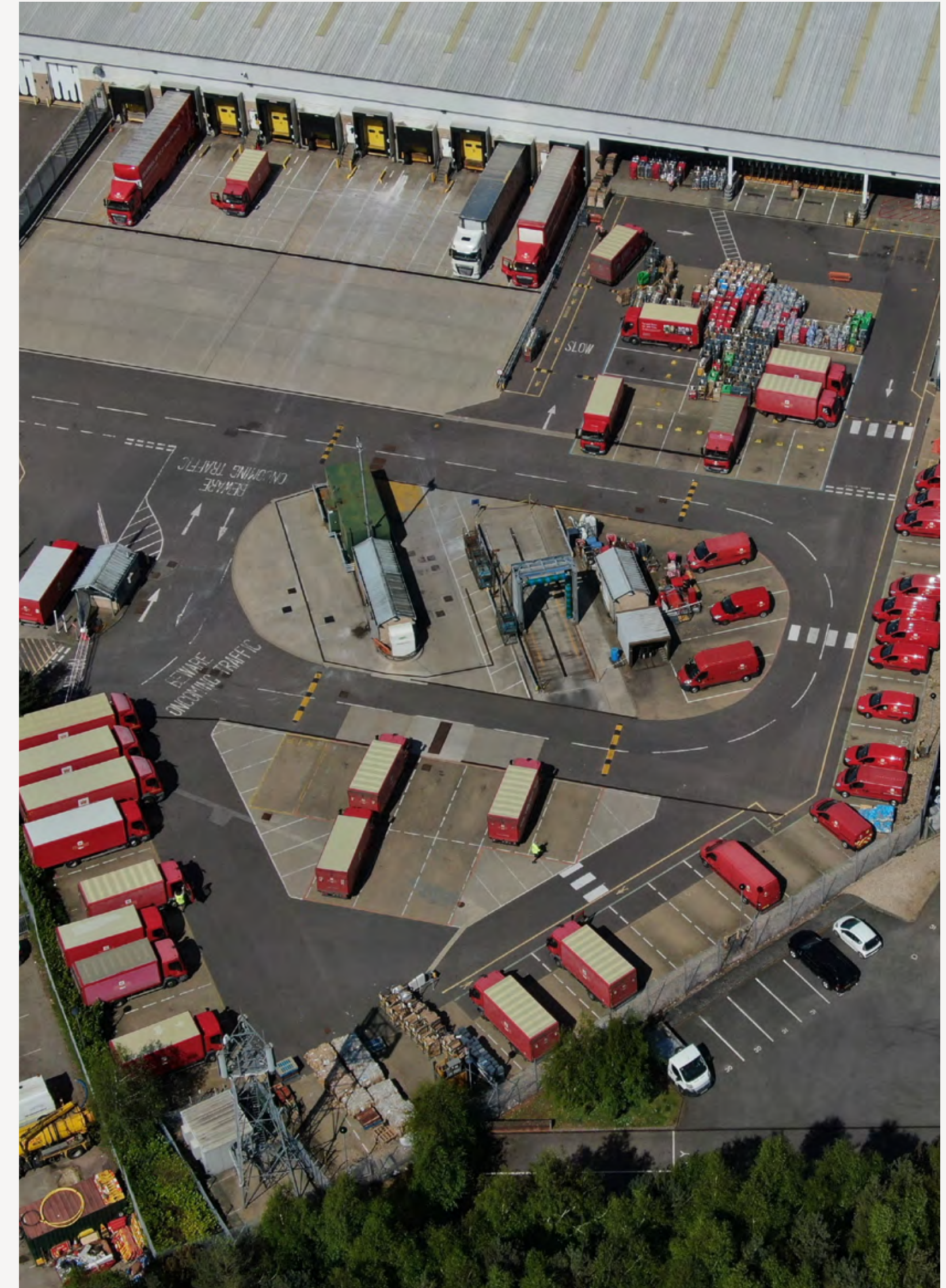
Distribution centers have seen enormous demand when high streets and malls were locked down in 2020.
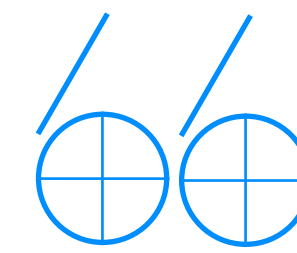
> Forget about the last mile. Now it's all about the last few feet and inches of the customer experience. But how do you manage an experience your brand is not in sole control of?

New patterns of demand need new business models and supply chain solutions.

WHAT'S NEXT

People's liquid expectations are driving a number of important and pressing challenges that companies must work to address. They include: how to get value from existing assets; how to play in the ecosystem with other business-to-business players; how to manage an experience the company is not in sole control of; and how to design for resilience and uncertainty.

Companies might need to rethink the position of supply chains within their business and make it a priority to expand the idea of what their assets are and how to use them. In the US, Lululemon Athletica reopened

its stores not to serve walk-in customers but fill online orders more quickly. Meanwhile, when Best Buy reopened its stores it did so only for staff to facilitate contactless curbside collection by customers.

This might also mean changing how they measure a supply chain — rather than just judging it by efficiency, they should also evaluate it for growth, flexibility and agility to deliver on experience as well as products.

Companies will need to decide which new trade-offs between cost and experience they're willing to make. In the early weeks of the pandemic in the UK, for example, some supermarkets slashed product ranges temporarily by up to 70% to focus on the remaining 30%.

Amazon's Whole Food shops are being used as "dark stores" serving fulfilment centers while closed to the public.

Amazon is using its Whole Food shops as "dark stores" serving fulfilment centers soon to be operated by robots. Barclays Bank expects that its physical branches will soon be used mainly by call center workers and investment banking, and Berlin's iconic Berghain nightclub was reborn as a gallery.

It's becoming important to embrace the opportunities that lie in the business-to-business sharing economy and new strategic partnerships that will make best use of existing assets. In Asia, JD.com has launched an "expert to domestic" initiative through its new app Jingxi, to let manufacturers open new stores on its platform for free and tap into its marketing, logistics and delivery services.

Collaboration was a key feature of the hospitality sector's response to the pandemic, where "dark kitchens" allow a number of delivery-only restaurants to share one kitchen space. It'll be interesting to see how new collaborations will offset the loss of brand experience previously delivered at point of sale in the physical world — on the high street, for example — by creating new points of delight at home.

Companies might need to explore new business models and value propositions. Subscription models grew not just during lockdown as a replacement for physical experience, but after. Pret a Manger, for example, launched a coffee subscription scheme to encourage customers back into spending. Walmart recently launched subscription delivery to your door service Walmart+, moving into space dominated by Amazon Prime.

The fashion industry, like many others, was hit hard by the pandemic. Small and medium-sized independent designers particularly suffered, so the opportunity to benefit from Amazon's delivery infrastructure

proved to be a lifeline for many. Exactly as Amazon had intended, this development enabled them to offer a premium and bespoke delivery experience as a new value proposition.

Walmart's redesigned in-store experience is pragmatic, offering quick and efficient testing of gadgets rather than experiential and with the emphasis on enabling customers to shop quickly as well as safely — a markedly different approach to browsing.

There's also likely to be a rise in two-speed innovation that makes businesses more agile and flexible to respond to change, while keeping true to their central purpose. LVMH's pivot to convert its perfume factories to making hand sanitizer during the early weeks of the pandemic demonstrates the speed with which companies may need to act — and can, when under pressure.

US food distribution Sysco, for example, built a supply chain and billing system to serve grocery stores, from scratch, within a week, while in-flight catering companies like Israel's Tamam Kitchen and Australia's Gate Gourmet began delivering quality meals to families stuck at home.

Companies will need to reimagine supply chain as a growth driver. Growing demand for personalization presents an important opportunity here, and one that requires supply chains to be more flexible and responsive — especially within the final ten feet.

5G could play an important role in this, enabling the wider deployment of immersive technologies to create a new generation of captivating brand experiences, and allowing greater personalization of the supply chain at the point of delivery. Understanding the ways in which 5G can be used within the emerging new liquid infrastructure will be critical — especially in remote areas, where the pandemic exposed the need to close the rural broadband digital divide.

Finally, the fact that companies will need to rethink their supply chain means they have an opportunity to consider sustainable alternatives while they're at it. Returns of certain items are often sent straight to landfill. In the US, Pottery Barn now works with The Renewal Workshop to sanitize all returned fabrics so that they are renewed then resold. Meanwhile, Sweden's IKEA recently opened its first secondhand shopping center.

Another way to use supply chains to better meet sustainability goals is by making them more local. German company Urban Drivestyle builds all its e-bikes in Berlin and is working to transfer its entire supply and production chain to Europe.

As part of a new push to reach customers during the pandemic, Whole Foods is participating in a New York City cargo e-bike delivery pilot to deliver groceries to online shoppers.
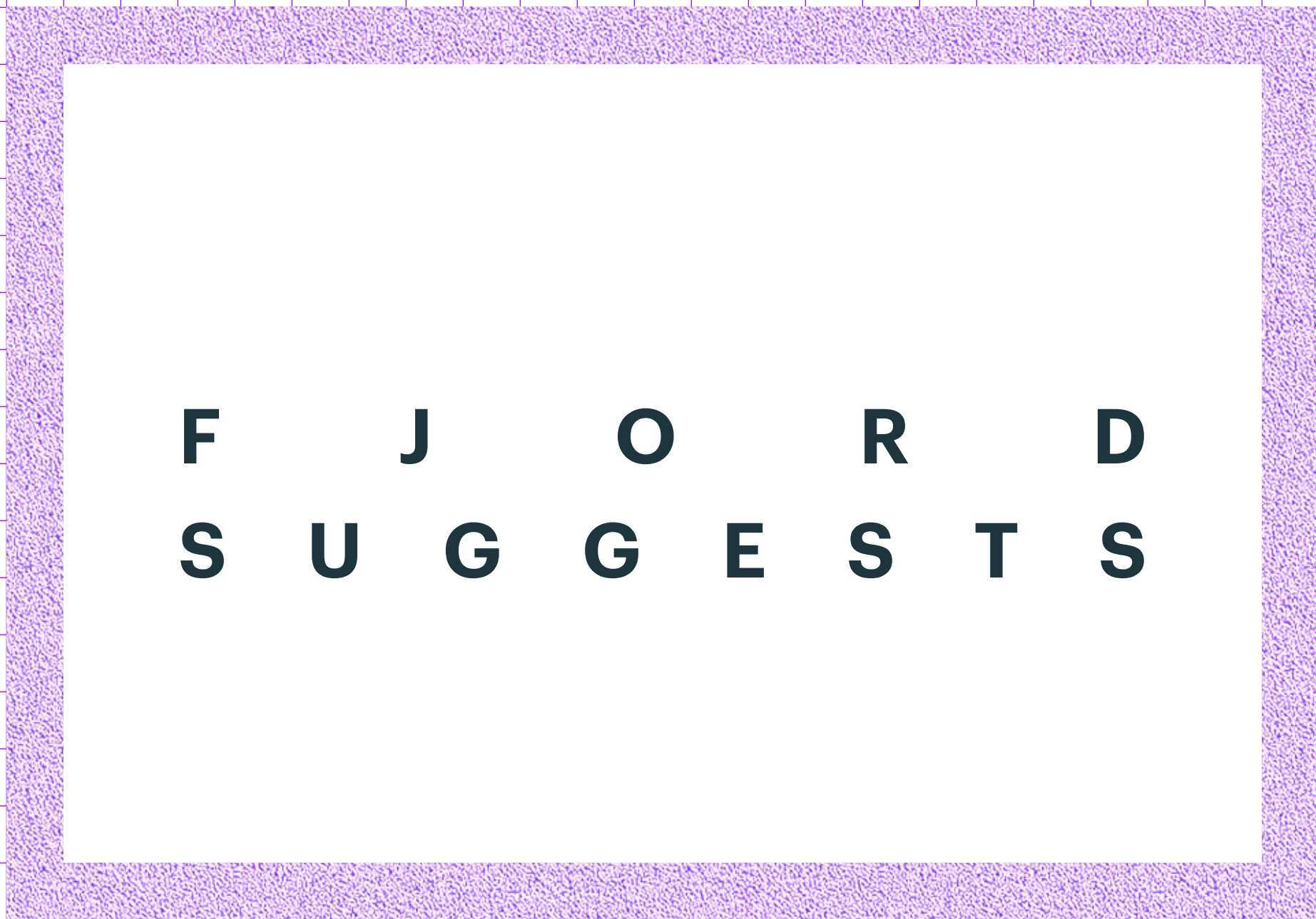
Taiwanese tech giant Foxconn, which makes an array of devices including iPhones, is making moves to fragment its supply chain into one for China, and several others for the rest of the world.

Organizations can (and should) build agility and resilience across their supply chains so they can adapt quickly to change. This is not just about being able to manage any further shifts caused by the pandemic and its aftermath, however. Rather, it's about futureproofing for changes they will certainly face one day — notably, climate change.

Keeping a whole supply chain local helps with sustainability goals, as shown by German e-bike company Urban Drivestyle.

F J O R D
S U G G E S T S

Think

Think of your supply chain and physical assets as growth—not efficiency—plays. What would you do differently? Analyze what assets like a "shop" really deliver. What belongs in digital and what belongs in the physical realm?

Say

Openly commit to shifting to sustainable redesign. Within five years, sustainability will be the biggest influence on your infrastructure decisions. Start figuring out how you design for sustainability — now.

Do

Evaluate the often-hidden parts of the experience chain that add unrecognized value. For example, is "waiting time" part of your experience? How can you use it as a white space to delight customers?

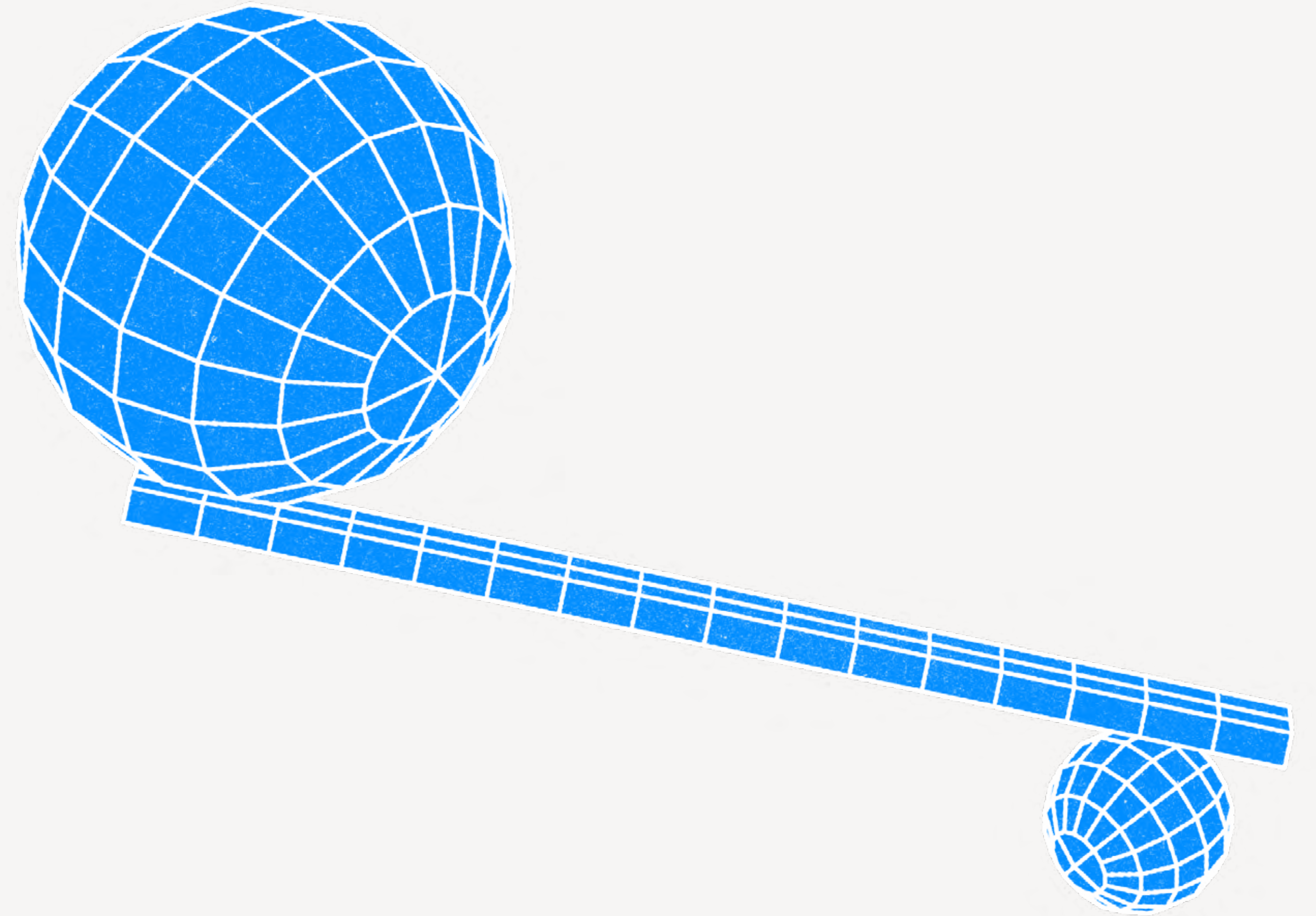# EMPATHY CHALLENGE

# INTRODUCTION

Awareness and concern about inequality in all its forms grew rapidly in 2020. This poses a challenge for organizations as they try to respond: how should they manage the narratives they use to shape their brands? Companies may need a new approach that blends pragmatism with empathy, and that ensures they are seen to follow through on their intentions to do good.

The fight for equality became a prevalent issue in 2020, with George Floyd's death sparking impassioned Black Lives Matter protests.

WHAT'S GOING ON?
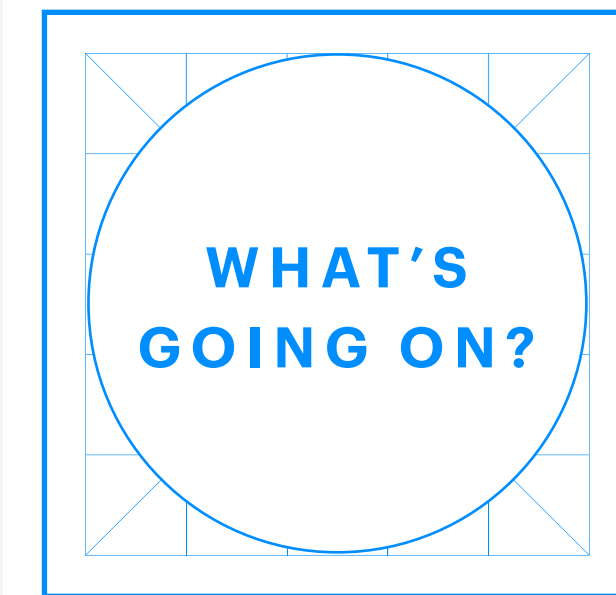
As we've observed in previous Fjord Trends reports, people are increasingly concerned about the purpose and ethics of the organizations they work for and whose products or services they use. Climate change has been a major concern in recent years but, for many people, inequality became one of the dominant issues in 2020.

The word "privilege" has become far more widely used, with renewed energy in the Black Lives Matter movement and countless impassioned discussions about racial injustice. Meanwhile, longstanding inequalities

between rich and poor, old and young, men and women, as well as different ethnic groups were thrown into sharp focus because Covid-19's impact was felt so unevenly around the world.

Pandemics tend to exacerbate existing inequalities — for women and girls especially, but also for groups like people with disabilities and those in extreme poverty. Analysis of Covid-19 deaths in a number of countries, including the US and UK, showed ongoing wide disparities by race.

On the subject of another existing inequality, Rodrigo Baggio, president of Recode, said, "The new reality is that Covid has accelerated and increased the digital divide. We are in a new kind of apartheid, a digital apartheid. It's more than a divide. People are excluded and don't have access in Brazil, in Latin America, in Africa."

Pandemics also create new inequalities. People whose employment had previously been stable and who now find themselves jobless in a difficult market are new casualties of existing inequalities. Closure of schools worldwide hit some children harder than others, with consequences of isolation such as delayed cognitive, emotional and social development.

Meanwhile, young workers are hit especially hard having to work from home, and not just because many can't accommodate a home office. They're also lacking the opportunity to build up social capital with colleagues, to nurture relationships essential for career advancement, and the ability to observe and learn from others in person.

We flagged companies' growing interest in meeting the needs of all stakeholders in last year's Fjord Trends. As it seems to become the norm, issues around stakeholder management — like guarding against disenfranchisement in staff, customers or shareholders — are moving centerstage, which is making it more important than ever to manage narratives well.

2020 brought new inequalities as people whose finances had previously been stable found themselves unemployed.

American women were three times more likely than men not to work during the pandemic because of childcare. Though American parents doubled the time they spent on education and household tasks before the pandemic, mothers spent 15 hours more on average per week than fathers. Meanwhile, 80% of the 1.1 million workers who dropped out of the US workforce in September were women.

Narratives are the stories we tell to express or prove our position or beliefs. Social media put narratives front and center because it gives everyone a chance to create them, like them, spread them and critique them. There have never been more different narratives fighting for our attention than there are today. Many of them are framed by culture wars, and some of those run contradictory to the truth. The easier it is

to access information, the more vulnerable we are to being deliberately misled or to believing unsubstantiated claims.

Companies now have to figure out how they want to handle polarizing narratives and which side of the story, if any, they choose to support. Staying silent is a choice and a statement on its own as well.

A cryptocurrency broker told employees it wouldn't stand for politics or social issues being championed in the office that took away focus on the company's mission, which it felt was already purpose-driven. The announce-ment sparked a passionate social media debate, and anyone who didn't like it was given the opportunity to leave with four to six months' severance pay, at which point 60 employees — some 5% — left the company. On the other side of the spectrum, we see strong stances like Expensify CEO Dave Barrett's plea to its 10 million customers to vote for Joe Biden for US President, which infused politics directly into the business.

We've also seen how governments have tried to tackle their official narratives in reaction to our ongoing health emergency. In Finland, the government enlisted influencers to communicate information about the pandemic, even giving them "key worker" status. The Taiwanese govern-ment executed a "humor over rumor" campaign that effectively quashed Covid-19 misinformation, by using "civic hackers" to counter a false claim with a fact-based joke within hours of the misinformed post appearing.

With inequality now top of mind, both the loud and the silent ones, what companies do about it and how they talk about it within their narratives matters a great deal. However, mastering the art of doing this has likely never been harder in recent times.

"Civic hackers" were asked by Taiwan's government to counter false claims online with fact-based jokes, to limit the spread of misinformation.

66
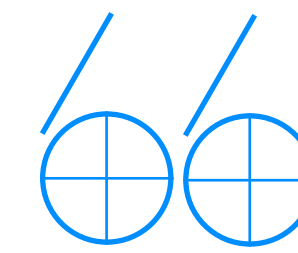
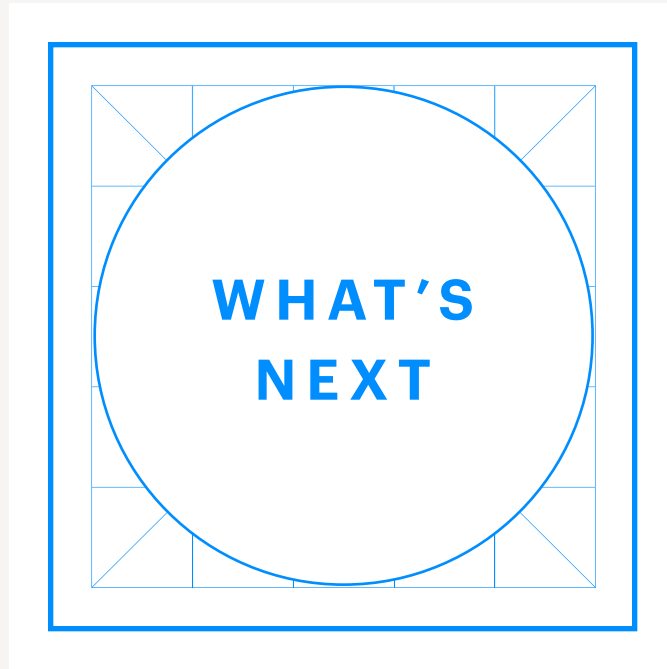With the effects of the virus being felt unevenly around the world, many existing inequalities were highlighted. With inequality now top of mind, both the loud and the silent ones, what companies do about it and how they talk about it within their narratives matters a great deal.

Having gathered a broad spectrum of opinions, White Ops decided to change its name to something more obviously unrelated to race.

WHAT'S NEXT

E mpathy is fundamental to good design. It's an intimate and inward-leaning understanding of the person you are designing for, that shapes the detail of how you design an interaction or interface. The challenge is that empathy for everyone seems very hard to achieve when companies take a stand on social issues. Narratives have turned social issues into political issues, and then into polarities to manage, made more complex by the fact we live in a world where corporate reputation hangs on every decision or output being subjected to unprecedented scrutiny.

As 2020 got into its stride, eBay offered small businesses a free ecommerce platform and support mechanisms to help them stay afloat.

HERE'S TO STAYING

UP & RUNNING

ebay

When the owners of a best-selling Asian toothpaste brand with a racially charged name and history decided to rename it in 2020, we saw simultaneous applause in western markets and angry backlash on Chinese social media. This neatly illustrates the complexity of the world in which businesses now operate. In September, Yelp's decision to flag businesses accused of racism sparked debates online.

An organization needs to be empathetic and be seen to behave as such. However, baked into the very concept is the fact that it's impossible to be empathetic to everyone all the time, so squaring this circle is the

empathy challenge. Yet today, many companies are trying to juggle action and messaging around numerous big, broad and deep topics all at the same time — and while striving to be profitable in their day-to-day operation. Before social media, it was a no-no to discuss politics, religion, and money at work, as such topics can lead to heated debates on strong beliefs, disagreements, and an uncomfortable environment. However, this is now normalized, and happening across employee and customer segments for brands.

Conflicting opinions on how best to prioritize and address today's pressing concerns — including sustainability, Black Lives Matter, inequality, pandemic fallout and business survival in the face of looming economic crisis — can create stress, division and disenfranchisement. It can also lead to organizations and individuals telling themselves misleading narratives (for instance that a society isn't racist, or a brand is caring), leaving them vulnerable to criticism.

To address this challenge, an organization can go down two routes: firstly, it can narrow its focus from thinking about all society to smaller sub-groups, which starts with prioritizing subjects that are closest in line with its purpose, then building behaviors around it. Alternatively, it can try to manage the polarities. As a Harvard Business Review article in 2018 suggested, "When two seemingly contradictory objectives present themselves, (e.g., maximizing shareholder value versus social responsibility), avoid the temptation to pick a side. Instead, embrace both "truths" and manage the tension between them over time."

As 2020 got into its stride, eBay chose to use its infrastructure and expertise to help small businesses that simply couldn't survive two or three months of lockdown. eBay launched an accelerator program called

"Up & Running", offering a free ecommerce platform, plus marketing tools and shipping discounts, which effectively gave small businesses a lifeline when they most needed it.

Netflix demonstrates its empathy towards parents by joining the forward-thinking companies that provide paid parental leave to mothers and fathers on their payroll. Salaried employees at Netflix can take up to a year off after the birth or adoption of a child, relieving some pressure at a critical time for families.
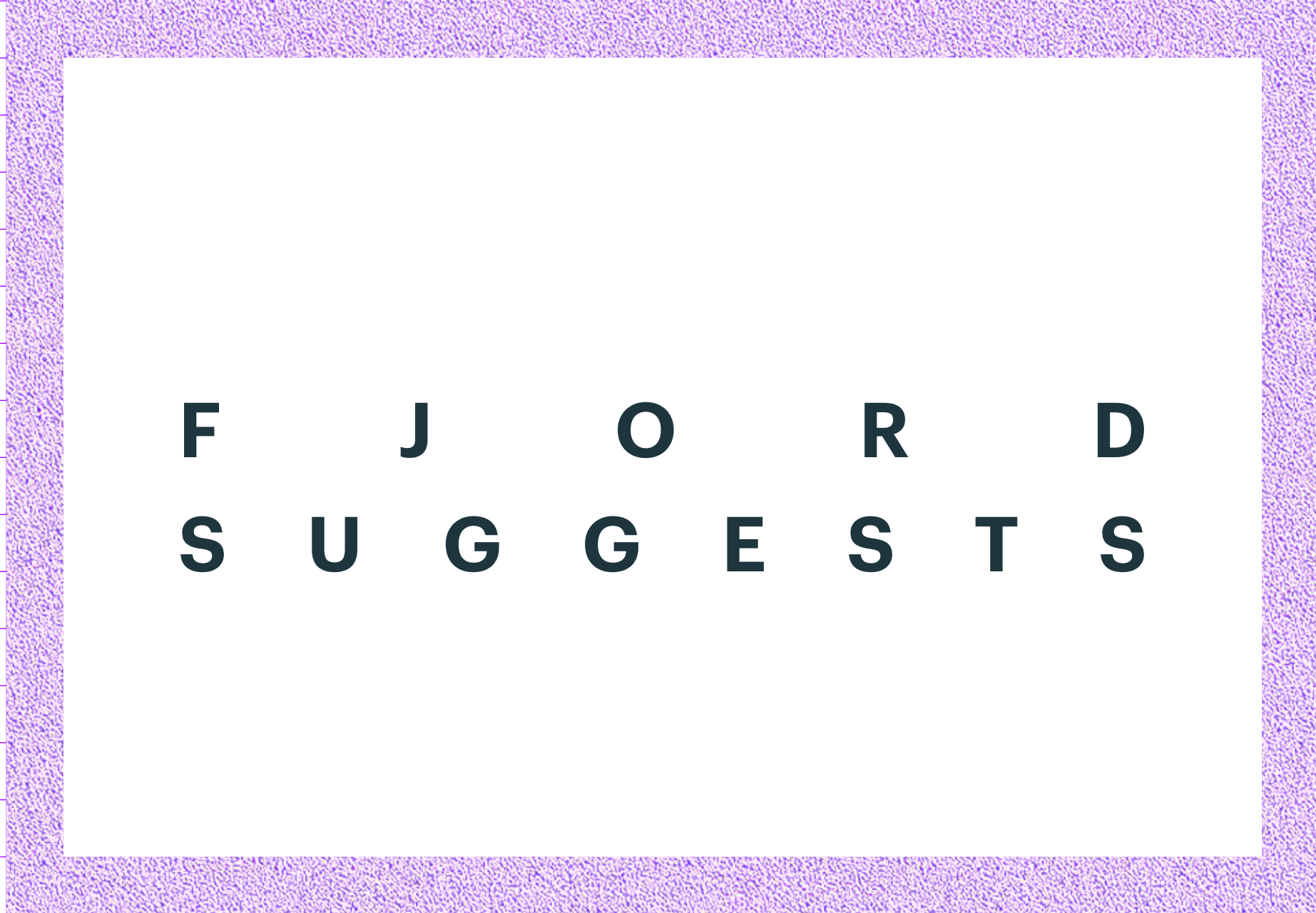

Patagonia's message to customers who bought their 2020 Road to Regenerative organic stand-up shorts, referring to politicians who deny or disregard the climate crisis and ignore science.

Patagonia, known for making bold moves that stays true to their core values, took this even further and sewed tags into its 2020 Road to Regenerative organic stand-up shorts line urging customers to "Vote the assholes out", referring to politicians who deny or disregard the climate crisis and ignore science.

To succeed, organizations might feel they should get both the message and the detail of every interaction absolutely right. Here lies another potential problem, though. In many organizations, design (which shapes the detail) and communications (which shapes the message) coexist separately in a divorced system. As we move forward, effective management of narratives might depend on a brand's experience and its messaging being created, shaped and executed in closer harmony.

Over the years, Design Thinking has unintentionally made empathy seem like something easily ticked off a list, by equating it with listening. Yet empathy is not just listening and nor is it a one-off exercise. Empathy is a way of behaving. This means that designers may not only craft the message, but also consider how to manage and communicate it, what tools to use to enrich, deepen and contrast it. It also could mean using behavioral tools as well as technological tools.

Stories have always mattered as they are central to the human experience. Now, they've become a core part of a brand's image, too. Effectively managing them by refocusing on the experiences of customers and communicating with them in a meaningful way has never been more important in recent times. However, as a brand in a world of polarized opinions and stories, how do you get it right?

F J O R D
S U G G E S T S

Think

Consider your employee stakeholders. You must carry the majority of your workforce with you (100% is a big ask). In order to do so, build purpose from the ground up and focus more on internal communications around empathy than external ones. Your employees are your advocates and will spread your empathy messages beyond your walls.

Say

Make your choices an open narrative that you engage with and align them to your purpose. Don't take on too many, as that might paralyze you. Be careful not to perpetuate your own echo chambers or create a culture that opens divisions within your company that you cannot close.

Do

Bring together design and communications to effectively close the gap between what you say and what you do.

RITUALS
LOST
AND
FOUND
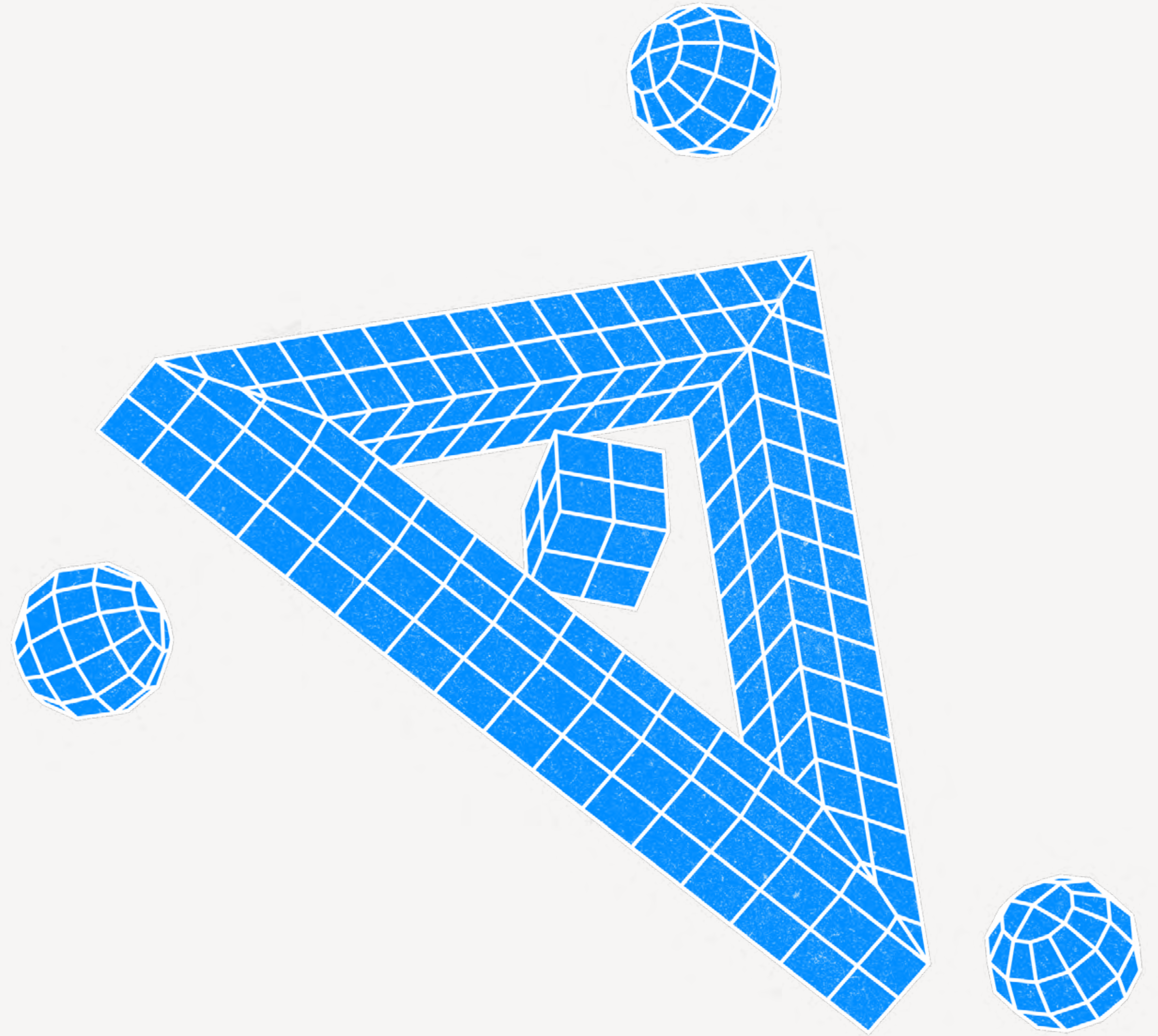
INTRODUCTION

The rituals that form the framework and coping strategies of everyday life have changed, disrupting the strong emotional ties associated with many of them. As people adjust, organizations must identify where they sit within this new context and how they can help build new ways for people to cope and reconnect.

Many of the joy-filled rituals we once took for granted were upset or postponed by infection control measures.

WHAT'S GOING ON?

A shared sense of loss has brought us together as people. Whether communal or performed alone, rituals have a causal impact on people's thoughts, behaviors, and feelings, and have done so for centuries. Many of us are now grieving the rituals of life we once enjoyed and, perhaps, took for granted. The shared emotional experiences around traditions associated with loss, celebration, ceremony, and routine help bind us together within our families and friend groups, work, local communities and wider society.

Lots of the habits of everyday life have been variously upended, rewritten or erased by restrictions imposed to prevent the spread of Covid-19.
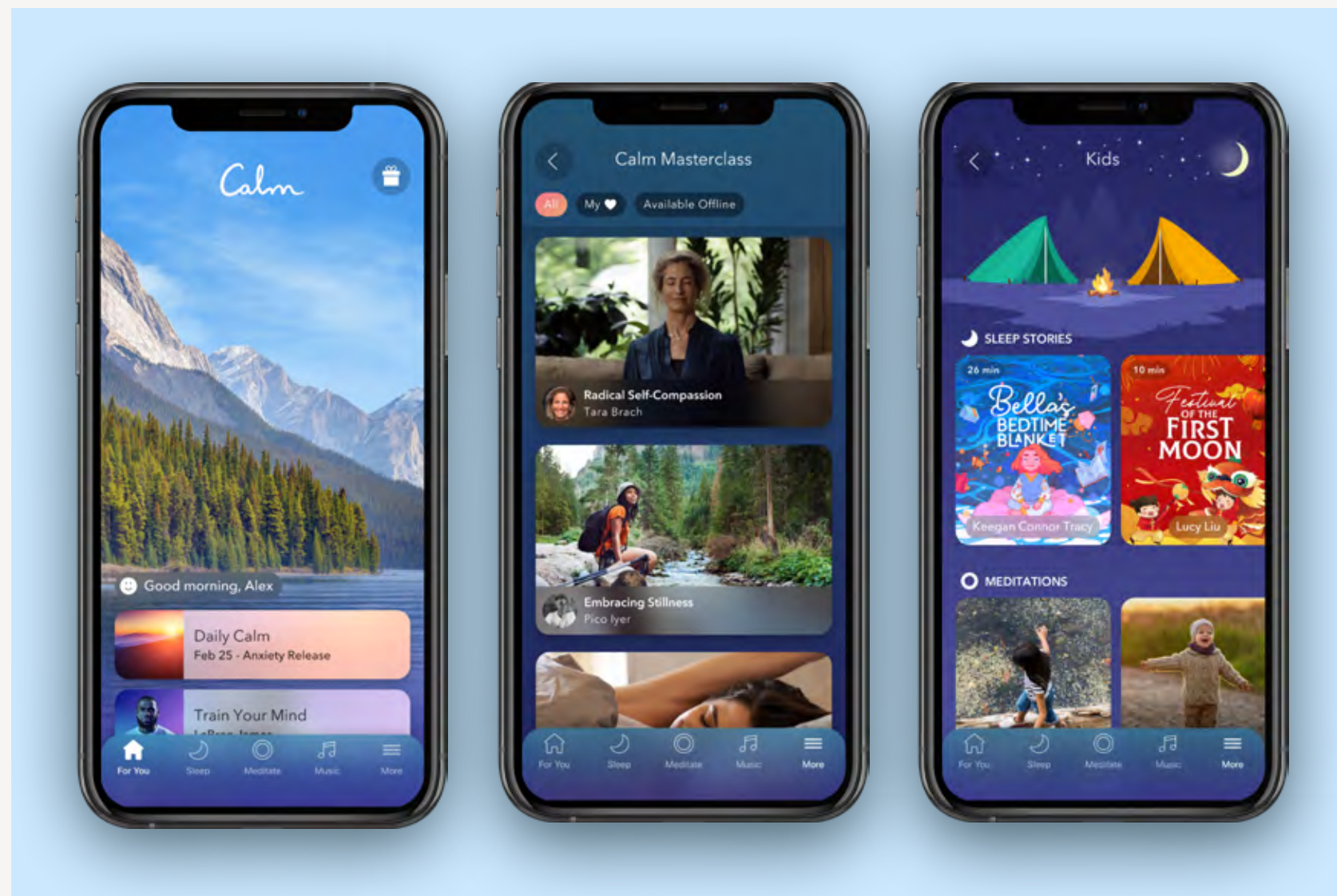
When there's strong sentimental significance attached to routines (and to the people, places and objects that we closely associate with them), we feel their loss profoundly, even in the context of much more serious losses around us.

Losing rituals might affect everyone in some way, and we're reminded daily of the disruption. Life events that bring family and friends together, like weddings and funerals, are obvious examples. Arguably just as difficult to manage is the disruption of the many small daily rituals — the ability to touch an avocado for ripeness in a grocery store, to hug friends and family, or grab a coffee with colleagues inside a café.

With so much change, it's been a period for reassessment and searching for new meaning that has inspired many people to develop new rituals that bring them joy and comfort in new routines. Many of us have formed new behaviors, including staying more in touch with the news, virtually connecting more often with family and friends, and spending more time on self-care and mental wellbeing.
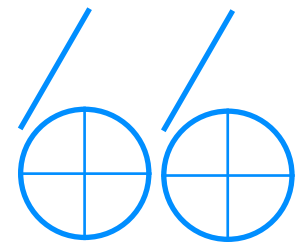
Some office workers have welcomed a break from their daily commute, while others miss the structure it provided or the decompression time they once had in transit between home and work. Some miss the local café where they always bought their favorite breakfast bagel, while others are glad of the healthier lifestyle they now have after being forced to rethink their past dependence on grab-and-go food.

In societies where mindfulness was less culturally ingrained, it's become more of a part of daily life for many. Use of meditation apps surged during the pandemic — mindfulness app Calm now even has a premium membership tier included on American Express cards. Meanwhile, spirituality has become commercial, fueled by a growing array of spiritual networks. In the US, personalized astrology app Co-Star raised US$5.2m in seed round funding.

In 2020, we've been prompted to rethink many aspects of our lives and to take a fresh look at our personal priorities and values. The act of doing that has uncovered new ways in which we can help our communities, from wearing a mask to shopping with local businesses. It's also developed our understanding of how, as individuals, our personal daily actions can contribute to bigger systemic change.

As of December 2020, the pandemic isn't over, and it's abundantly clear that people want — and need — new habits, rituals and coping strategies to help them live in their new and unbidden circumstances.

The active pursuit of quiet contentment and good mental health has driven a rise in demand for meditation apps like Calm.

> Whether it's coffee with our colleagues, Saturday sports, or applying makeup with friends, losing our rituals affect us all in some way.

With cabin fever rife and indoor exercise rituals on hold, activities like sea swimming have become increasingly popular.

WHAT'S NEXT

B rands have a huge opportunity to support people as they develop new rituals, like activities that are healthier, more sustainable or community focused. One third of Britons recently polled claimed to have developed "good" habits during lockdown.

In the US, 75% of customers tried different stores, websites or brands during the pandemic, and 60% of those expect to integrate new brands or stores into their post-pandemic lives. If brands can find ways to help people feel empowered and regain a sense of control in uncertain times, they can help people reconnect and heal (and be appreciated for it).
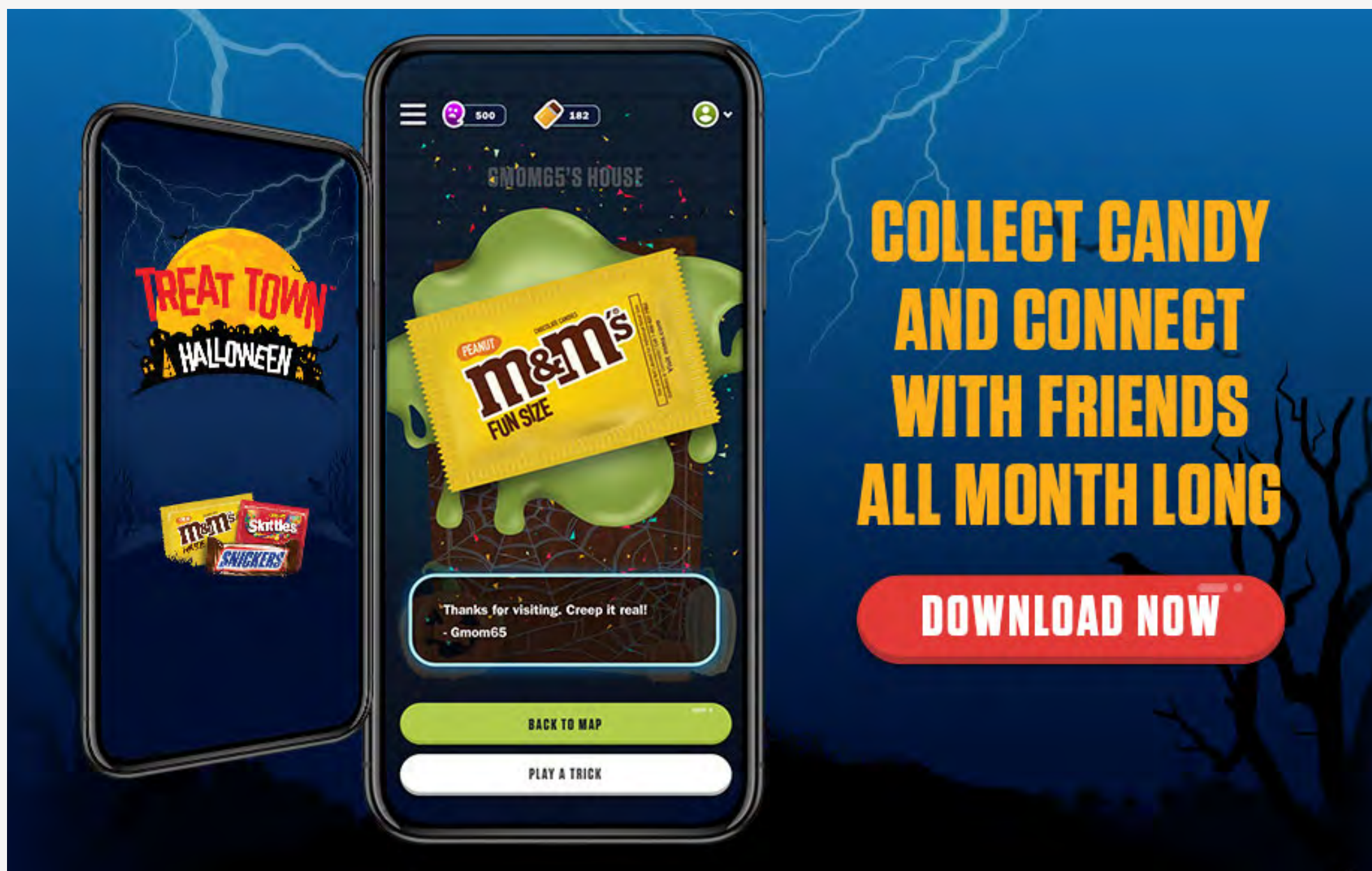
The first step brands must take is to ask: is this brand part of a habit or a ritual?

Habits are things we do to make life easier, like wearing the same clothes or choosing the same lunch every day, just so we don't have to think about it. Though habits make life easy, their nature makes them more disposable, in a way. Many habits changed because of Covid-19 and, as the crisis improves, not all will remain.

Rituals, on the other hand, make life meaningful. They can provide a way of coping, nostalgia and familiarity, or a sense of connectivity and belonging, and as such they are likely to be longer lasting. A ritual might

be getting up fifteen minutes before the rest of the family to have a coffee and watch the clouds — a moment of calm that sets you up for whatever the day might hold.

Brands must work to understand the blank space left by a lost ritual, then identify and design an appropriate experience that could replace it. Brands involved in someone's former ritual are likely to need to reimagine that experience. Whichever angle a brand is coming from, emotional connection will be key to their success, because a ritual is about more than just function.

When the pandemic threatened people's Halloween rituals, confectionary companies stepped in to invent 2020-safe options. Mars Wrigley, for example, released an app for a virtual trick-or-treating experience that enabled people to rack up points they could redeem against real candy, and made variety bags for Zoom costume parties and scary home movie nights.

We have identified four roles for rituals often associated with brands, which could be used as a platform on which to build new rituals.

Ritual as portal

A ritual can be a transition point between our different selves. Worker-me might become downtime-me while reading a book on the train home, for example, or everyday-me might become holiday-me while packing and listening to a podcast. Transition rituals are especially relevant for brands in beauty, grooming and fashion, where our ability to express ourselves through our appearance has been changed by lockdowns and new home working routines.

Imaginative brands like Mars Wrigley found ways to digitize (and therefore sanitize) Halloween rituals.

Microsoft is offering a way to replicate healthy boundaries between work and home life by creating "virtual commutes" on Teams. In China, a Japanese street built to allow would-be Chinese tourists to escape the everyday has proven extremely popular with people unable to travel to see the real thing.

Ritual as sense of belonging

A ritual can provide or reinforce a sense of belonging, too. Friday night drinks or Sunday morning team sports are examples of rituals around which many products and services are consumed in a social setting. The challenge for brands is to create experiences that can become rituals outside a conventional physical social setting, yet retain the same sense of community.

Personalized astrology app Co-Star brings astrology into the 21st century using AI that merges NASA data with the insight of human astrologers.

One example is Netflix Party, which synchronizes video playback and adds group so you can remotely watch content with friends. Another is a collaboration between Budweiser, Carlsberg, Rémy Martin and Pernod Ricard, ecommerce giant JD.com and Chinese music label Taihe Music Group, which stages online club nights streamed direct to people's homes.

Singapore fitness and boxing studio boOm launched virtual workouts after closing its gyms, and arguably the most powerful benefit was the opportunity for its customers to retain a sense of community.

Ritual as comfort

While a ritual may be a more meaningful activity requiring focus and/or effort, it can also be a powerful source of comfort. In San Francisco neighborhood Bernal Heights, for example, new social rituals like socially distanced street dance parties and cocktail hours are fast becoming permanent fixtures, demonstrating the staying power of self-driven behavior.

Opportunity for brands lies in considering how they can enhance such moments by deepening the emotions felt — a sense of release, for example, or by making things easier — such as bundling products for a celebratory Friday night meal.

Estée Lauder has enabled people who listen to Spotify's free service on a Google Home device to request a sample of Advanced Night Repair serum, and build personalized "New Beginnings" playlists based on their listening patterns. Each week, Estée Lauder and Spotify will refresh the playlist and add short audio notes relating to bedtime skincare routines.

Such "me time" moments are rituals as comfort. Many people now at home most or all of the time with cohabitees are seeking new ways to build personal escape into their daily routine to boost their mental wellbeing. This is especially relevant to self-care and wellness brands, and it could involve anything that can bring joy, whether it's a podcast, seeing some art, going for a walk or reading a book.

Ritual as anchor

The big moments we celebrate in life — birthdays, marriages, Christmas, Diwali, Eid — are less frequent but are often shared with other people, and offer significant scope for rituals as anchors. These moments and their associated rituals give us a framework for understanding and marking the passing of time.

2020's challenges drove millions to start thinking about Christmas earlier than ever, to anchor their existence around something that brings them joy. When UK retailer John Lewis saw that searches for festive products were nearly four times more than August 2019, it opened its Christmas shop sooner than planned.

Wedding website Shaddi.com created a new "Weddings from home" program to help people get married during the pandemic, seeking to bring many of the most meaningful moments of an in-person event to virtual weddings. For instance, recognizing the catering as a meaningful part of the event, they delivered food to guests' homes.

Products and services have long played a role in anchor rituals. Brands can help people reimagine emotional landmarks at a time when it's hard for many to get together physically. Pay-later fintech Klarna hosted an

Craving joyful experiences, four times more people searched for Christmas in August than in 2019, prompting John Lewis to open their Christmas shop sooner, including a thoughtful, virtual festive store.

online music festival called Klarnival via Instagram and Facebook Live in August, to fill the gap left by cancelled live events typically used to mark and celebrate the summer.

Simply shifting a ritual online won't automatically satisfy the same need, because the human qualities and emotions attached to a ritual are where its strength and power lie — not the mechanics of it. In Japan, an app allowing smartphone users to cheer (or jeer) remotely during a match and have that sound played live in the stadium recreates not just the ritual but some of the feelings associated with it. It creates a way for remote spectators to enjoy the camaraderie of shared moments, eating and drinking, cheering and chatting.

Behavioral design principles should inform the design of rituals, starting with identifying both current and target behavior. Three behavioral considerations should then be addressed:
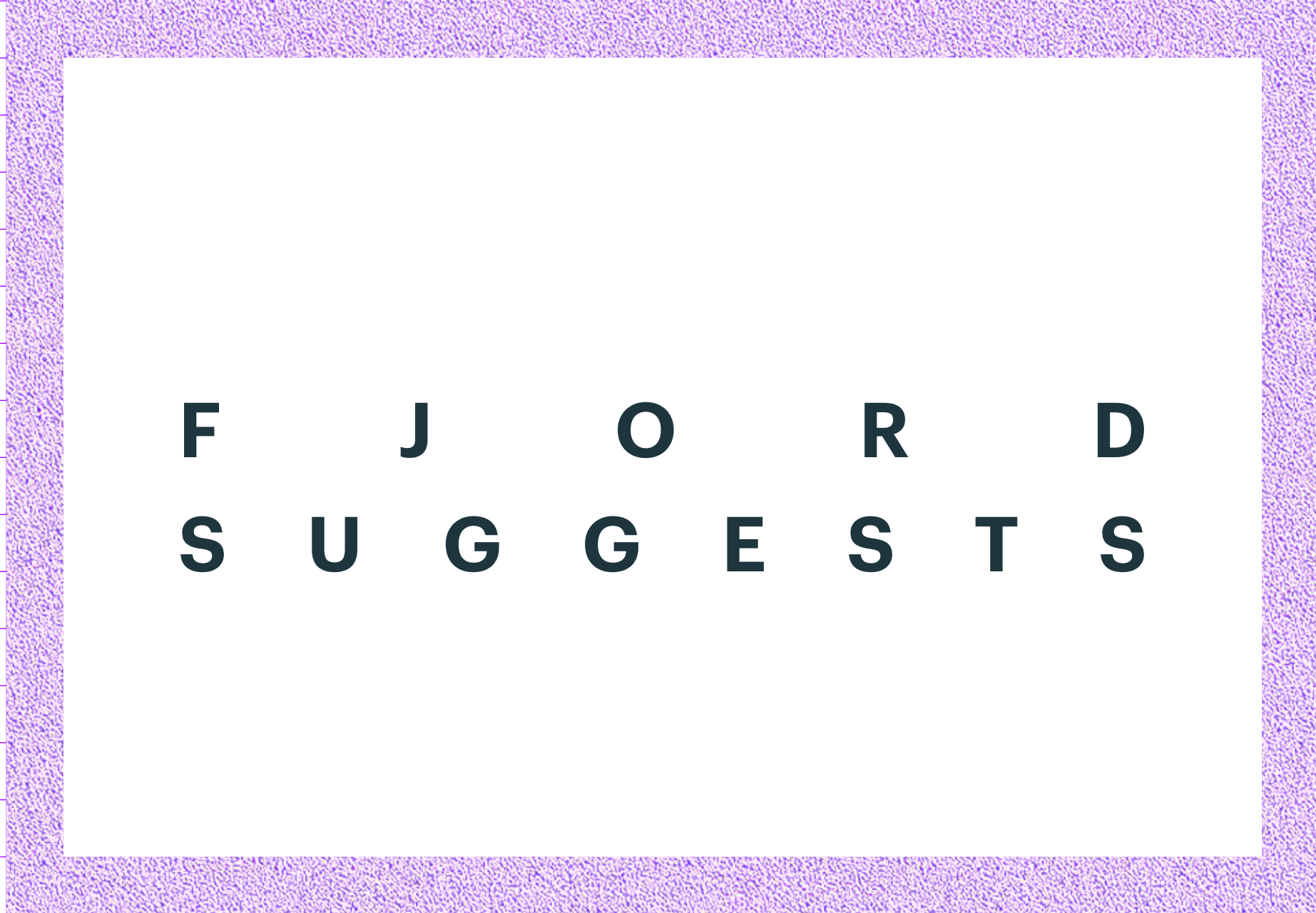
1.   How motivated are people to change?

2.   How well-equipped do people feel to change?

3.   Is now the right time for an individual to think about changing?

Armed with the answers, it's possible to design, prototype and refine an intervention that can stimulate the new ritual.

The golden rule is that any ritual a brand creates must speak to and be intrinsically linked with its brand purpose, if doing it is to make sense. When the right ritual is well balanced with the right purpose, it could enable customers to actively engage in causes that matter to them — and give them the satisfaction of being able to contribute to change on a larger scale.
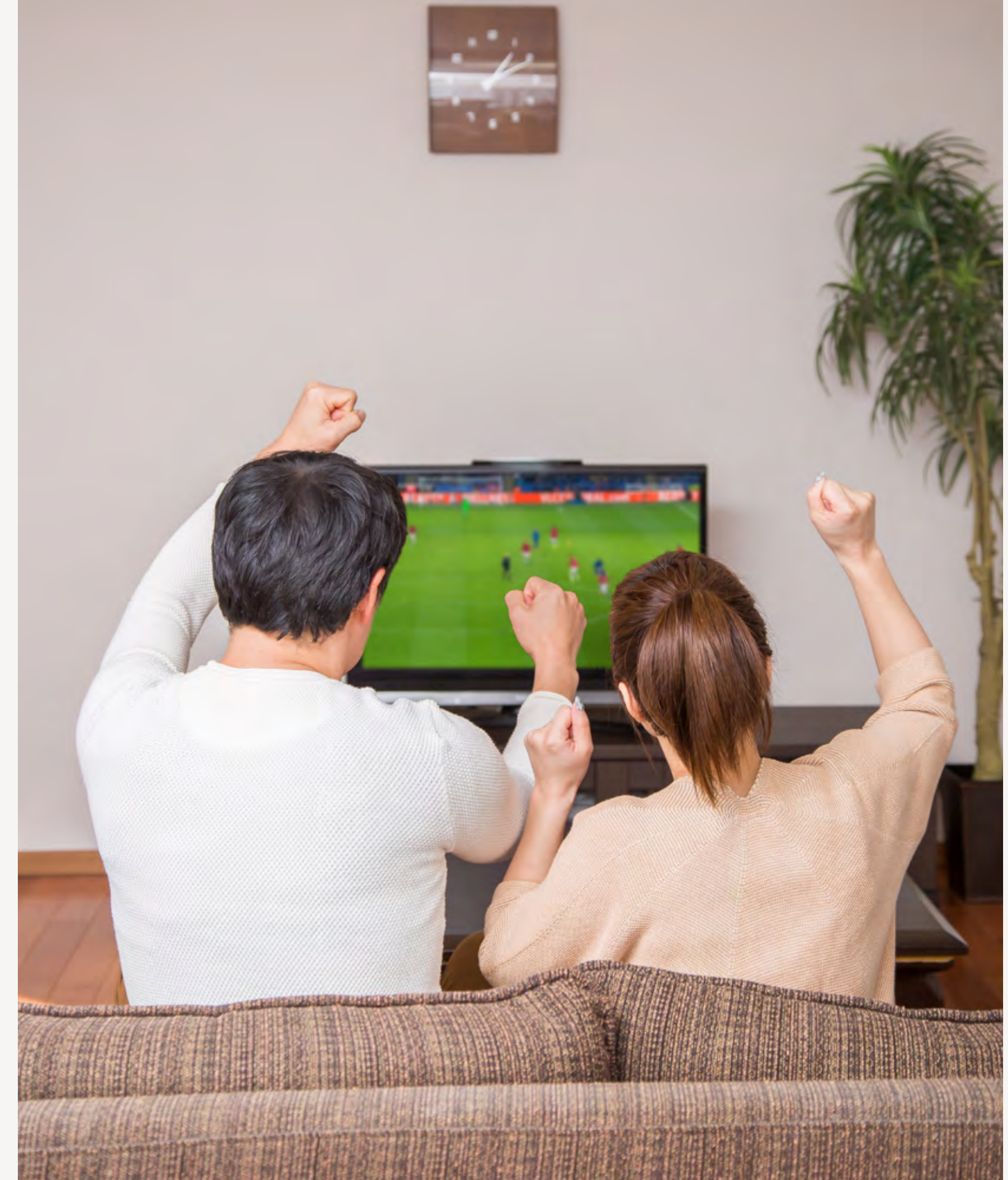
Trying to replicate part of the live experience, apps now let people cheer for their teams, playing their responses live in the stadium.

F J O R D   S U G G E S T S

Think

Unpack the mechanics of rituals to understand not only how people feel but what they do at a detailed level. These will probably differ from market to market, and the balance of where they take place (online/offline) may shift over time as the pandemic plays out.

Say

Brands are now widely expected to have a voice and speak on issues (see our *Empathy challenge* trend). Choose carefully how you use your brand's voice to help people through their life changes. Acknowledge to your customers that we're in this together to find some sense of normality in our lives — and say it authentically.

Do

Encourage rituals to transition from lost to found. Help people feel more relevant. How can you support psychological sustain-ability? How can you incorporate mental health considerations into your products and services? While we're all in this together, our personal experiences vary, so remember that some people will be coping and grieving, while others are embracing new sources of joy.

ABOUT ACCENTURE

Accenture is a global professional services company with leading capabilities in digital, cloud and security. Combining unmatched experience and specialized skills across more than 40 industries, we offer Strategy and Consulting, Interactive, Technology and Operations services—all powered by the world's largest network of Advanced Technology and Intelligent Operations centers. Our 506,000 people deliver on the promise of technology and human ingenuity every day, serving clients in more than 120 countries. We embrace the power of change to create value and shared success for our clients, people, shareholders, partners and communities.

Visit us at accenture.com

ACCENTURE INTERACTIVE

Accenture Interactive helps the world's leading brands transform their customer experiences across the entire customer journey. Through our connected offerings in design, marketing, content and commerce, we create new ways to win in today's experience-led economy. Accenture Interactive was ranked the world's largest and fastest-growing digital agency in the latest Ad Age Agency Report.

To learn more, follow us @AccentureACTIVE

Visit us at accenture.com/interactive

AUTHORS

Mark Curtis

Head of Innovation and
Thought Leadership –
Accenture Interactive

in LinkedIn

Martha Cotton

Fjord Global Co-lead

in LinkedIn

Nick de la Mare

Fjord North America Lead

in LinkedIn

Talya Fisher

Program Management Lead +
Fjord North America Inclusion &
Diversity Lead

in LinkedIn

Fabio Sergio

Fjord Europe Co-lead

in LinkedIn

Jussi Edlund

Fjord Regional Design
Director, Asia

in LinkedIn

References

1 Collective displacement

Daniel Moss, Bloomberg, "The megacity is dead. Long live the megacity," June 14, 2020

Siegfrid Alegado and Andreo Colanzo, Bloomberg, "Duterte is paying Filipinos to move from city to countryside," May 31, 2020

Ruth Bender, The Wall Street Journal, "Escape to the country: why city living is losing its appeal during the pandemic," June 21, 2020

Richard Fry, Jeffrey S. Passel and D'vera Cohn, Pew Research Center, "A majority of young adults in the U.S. live with their parents for the first time since the Great Depression," September 4, 2020.

Imogen Watson, The Drum, "Love in the time of coronavirus: dating apps buck the downward ad spend trend," May 12, 2020

Gerben Meynen, US National Library of Medicine, National Institutes of Health, "Free will and mental disorder: Exploring the relationship," October 8, 2010.

Jill Standish and Maureen Bossi, Accenture, "How is Covid-19 changing the retail consumer?," August 2020

Hayley Dixon and Lizzie Roberts, The Telegraph, "'Does anyone know what it means?' How coronavirus rules have changed 200 times, September 25, 2020

Elisabeth Buchwald, MarketWatch, "60% of Yelp businesses that closed during the pandemic will stay shut permanently, report finds," September 17, 2020.

Sean Ingle, The Guardian, "'Strangest ever' London Marathon is a virtual hit with 43,000 runners," October 4, 2020

Masha Borak, South China Morning Post, "I took a walk through China's VR mall without ever leaving my couch," April 7, 2020

Dan Frommer, The New Consumer, "Rethinking the Starbucks 'third place'," June 12, 2020

2 Do it yourself innovation

Dirk G. Schroeder, Harvard Business Review, "Turn your Covid-19 solution into a viable business," July 2, 2020

CGTN, "Lockdown boredom may prompt 'greatest period of creativity in history'," June 14, 2020

Tom Jacobs, Pacific Standard, "Constraints can be a catalyst for creativity," April 25, 2020

Think With Google, "Are recent trends here to stay?," 2020

CGTN, "Lockdown boredom may prompt 'greatest period of creativity in history'," June 14, 2020

Douglas Shaw, BBC News, "CEO secrets: The graduates launching start-ups in lockdown," October 6, 2020

Gwynn Guilford and Charity L. Scott, The Wall Street Journal, "Is it insane to start a business during Coronavirus? Millions of Americans don't think so," September 26, 2020

Josephine Mason, Peter Henderson and Luiza Ilie, Reuters, "Mother of invention: the new gadgets dreamt up to fight coronavirus," April 1, 2020

The Economist, "The number of new businesses in America is booming," October 11, 2020

Karen Gilchrist, CNBC, "Singapore's freelancers find new income during the coronavirus pandemic," September 6, 2020

Elia El Habre, Rest of World, "WhatsApp school is now in session," August 27, 2020

Anthony Ha, Yahoo! News, "Fortnite hosted a psychedelic Travis Scott concert and 12.3M people watched," April 24, 2020

Sophia Smith Galer, BBC News, "Dating apps, video games and TikTok: The digital activism boosting Black Lives Matter," June 17, 2020

Emily Farra, Vogue, "Influencers are the retailers of the 2020s," October 19, 2020

Izea, "20 influencer marketing trends in 2020," June 8, 2020

John McCarthy, The Drum, "Amid swell of support, Patreon explains why it's now 'a lifeline for creators'," April 15, 2020

Helen Santoro, Wired, "Doctors and nurses take to TikTok to fight Covid myths," June 9, 2020

Zachery Dereniowski (MDMotivator), TikTok, November 4, 2020

Danielle Wightman-Stone, Fashion United, "Asos marketplace reports lockdown growth," May 28, 2020

Spencer Soper, Bloomberg, "Amazon drivers are hanging smartphones in trees to get more work," September 1, 2020

New York Times, "What Satya Nadella thinks," May 14, 2020

Tim Bradshaw, Financial Times, "Spending on Shopify surpasses eBay as Covid-19 sends shoppers online

Maghan McDowell, Vogue, "Digital fashion surges in a sales downturn," April 14, 2020

Sindhu Kashyaap, YourStory, "Curefit to launch paid subscription packs for online classes," May 20, 2020

Japan Times, "Pandemic bolsters case for telemedicine across the Asia-Pacific region," July 27, 2020

Discovery, "How Covid-19 has accelerated the uptake of telemedicine," May 7, 2020

BBC News, "Amazon launches online pharmacy in India," August 14, 2020

Lucy Ford, Teespring community, "Press release: 'Creator commerce' drives Teespring to hyper-growth," July 28, 2020

Benedict Evans, Benedict Evans Newsletter, 2020.

3 Sweet teams are made of this

Felix Richter, Statista, "Slack's customer growth accelerates during the pandemic," November 26, 2020

John Koetsier, Forbes, "Microsoft: 775% increase in cloud services, 44 million daily Teams users, 900 million meeting minutes weekly, March 29, 2020

Joanna Partridge, The Guardian, "UK office workers slower to return to their desk after Covid," August 5, 2020

Kate Magee, Campaign, "Is Netflix's Reed Hastings right to call working from home a 'pure negative'?," September 16, 2020

Gov.uk, "Get a discount with the Eat Out to Help Out scheme," 2020

Daniel Thomas and Alice Hancock, Financial Times, "Companies scramble to reverse UK back-to-office plans," September 22, 2020

The Adecco Group, "UK workforce wants 'hybrid-working', not the end of the office," June 30, 2020

Accenture, Accenture Research C-suite functional pulse survey, July 2020.

Karen Gilchrist, CNBC, "How big businesses in Singapore are managing the challenges of coronavirus," August 23, 2020

Frederic Lardinois, TechCrunch, "Google launches new AI-powered meeting room hardware," September 15, 2020

Philip Stevens, Designboom, "Facebook's 'infinity office' is a virtual reality working environment," September 17, 2020

Figma.com, accessed November 30, 2020

Boris Groysberg, Jeremiah Lee, Jesse Price, and J. Yo-Jud Cheng, Harvard Business Review, "The leader's guide to corporate culture," January-February, 2018

Brian Elliott, Slack blog, "Rewiring how we work: building a new employee experience for a digital-first world," October 7, 2020

Matt Weston, The HR Director, "How Covid-19 has impacted organisational culture," 2020

Mike Davidson, Twitter, October 11, 2020

Avery Hartmans, Business Insider, "Tech companies are starting to let their employees work from anywhere – as long as they take a lower salary," September 15, 2020

Sarah Todd, Quartz, "What an anti-racist workplace looks like," July 12, 2020

Evelina Nedlund, Employee Benefit News, "Benefits startup offers apps like Uber Eats ," July 12, 2020

Alex Christian, Wired, "Bosses started spying on remote workers. Now they're fighting back," August 10, 2020

Jennifer Christie, Twitter blog, "Keepig our employees and partners safe during #coronavirus," May 12, 2020

References

4 Interaction wanderlust

Jurica Dujmovic, MarketWatch, "Opinion: As coronavirus hits hard, Amazon starts licensing cashier-free technology to retailers," March 31, 2020

Minda Zetlin, Inc., "Amazon's new payment technology could change in-store shopping forever," October 2, 2020

Developer.leapmotion.com, accessed December 3, 2020

Xinmei Shen, South China Morning Post, "Unmanned grocery store built to fight coronavirus at new Wuhan hospital," February 2, 2020

John Glenday, The Drum, "TikTok hits 100 millio user milsetoe in Europe as US sale deadline looms," September 14, 2020

Libby Sander and Oliver Bauman, Ideas.Ted.com, "Zoom fatigue is real – here's why video calls are so draining," May 19, 2020

Mark Wilson, Fast Company, "These four brilliant ideas would make Zoom work a lot better," October 9, 2020

Carolina Milanesi, Fast Company, "With Samsung's Galaxy Z Fold2, phone experiences are morphing, again," September 19, 2020

David Pierce, Protocol, "How Discord (somewhat accidentally) invented the future of the internet," October 29, 2020

Artists.bandsintown.com, "Bandsintown + Twitch," accessed December 3, 2020

Mark Wilson, Fast Company, "I worked out in VR, and I liked it," September 30, 2020

Siobhan Riding, Financial Times, "Fund groups enter digital arms race to keep remote clients engaged," June 4, 2020

Sarah Perez, TechCrunch, "Spotify adds virtual event listings to its app," September 15, 2020

Casey Newton, The Verge, "Facebook Messenger adds Watch Together to let you watch videos with friends," September 14, 2020

Tenzin Norzom, YourStory, "Meet 5 women entrepreneurs who have successfully pivoted their business in the time of coronavirus," July 25, 2020

Alex Konrad, Forbes, "Mmhmm, five-month-old video startup making virtual meetings more fun raises $31 million pre-launch," October 7, 2020

Sarah Baxter, The Guardian, "Helsinki's huge VR gig hints at the potential of virtual tourism," May 5, 2020

Cathy Applefeld Olson, Forbes, "How artists can optimize the virtual concert experience," July 13, 2020

Allison Gordon, CNN, "Alexandria Ocasio-Cortez joins 'Animal Crossing'," May 8, 2020

Allen Kim, CNN, "'Animal Crossing' players can deck their virtual yards with Joe Biden campaign signs," September 1, 2020

Meghan Perkins, Live Design, "Fans escape to a virtual NYC during the 2020 MTV VMAs," September 18, 2020

Sanjay Podder, Adam Burden, Shalabh Kumar Singh, and Regina Maruca, Harvard Business Review, "How green is your software?," September 18, 2020

5 Liquid infrastructure

Alistair Gray, Financial Times, "Big food brands sidestep retailers in pandemic," May 28, 2020

Lisa Johnston, Consumer Goods Technology, "PepsiCo quickly launches two DTC snack & beverage sites," May 12, 2020

PTI, Financial Express, "'Direct-to-consumer': LG India launches online store to deliver products at doorsteps amid Covid," August 10, 2020

Jamie Grill-Goodman, RIS News, "What the new Sephora store experience looks like," May 20, 2020

Adele Peters, Fast Company, "This company lets small towns have bike shares, too," March 30, 2020

Alina Selyukh, NPR, "The cost of free: Casper pays a price for generous mattress returns," January 17, 2020

Amazon.com, Amazon Explore, accessed December 3, 2020

Phil Wahba, Fortune, "The retailers that are smartest about shopping tech will finish on top after the coronavirus," April 20, 2020

Kim Lyons, The Verge, "Best Buy moves to curbside pickup only as it sees surge in orders for home office equipment," March 22, 2020

Ian Quinn, The Grocer, "What are the supermarkets doing to ensure we don't run out of food?," 2020

Steven Melendez, Fast Company, "Amazon's new NYC Whole Foods Market is basically an Amazon warehouse," September 1, 2020

Mark Sweney and Kalyeena Makoroff, The Guardian, "Flexible working will be norm after Covid-19 lockdown, say Barclays and WPP bosses," April 29, 2020.

Philip Oltermann, The Guardian, "Auf wiedersehen, techno: Berlin's banging club Berghain reborn as a gallery," September 8, 2020

Ling Cao, MarketScreener, "JD.com: Enterprises move to export business to domestic sales with JD's help," June 8, 2020

Tim Bradshaw, Financial Times, "The start-ups building 'dark kitchens' for Uber Eats and Deliveroo," May 21, 2019

Jill Standish and Maureen Bossi, Accenture, "How is Covid-19 changing the retail consumer?," August 2020

BBC News, "Pret a manger offers coffee on a monthly subscription," September 4, 2020

Joanna Sciarrino, Forbes, "Walmart Plus: Everything you need to know about the new Walmart delivery service," September 15, 2020

Pamela N. Danziger, Forbes, "Amazon offers fashion brands a lifeline in a market disrupted by the Covid pandemic," August 16, 2020

Mark Wilson, Fast Company, "Walmart's new store design proves browsing is dead," September 30, 2020

Richard Kestenbaum, Forbes, "LVMH converting its perfume factories to make hand sanitizer," March 15, 2020

The Economist, "The pandemic is liberating firms to experiment with radical new ideas," April 25, 2020

Farah Khalfe, Fast Company, "Singapore Airlines is turning its planes into pop-up restaurants," October 14, 2020

Peter Linder, Ericsson blog, "Putting the spotlight on 5G in rural areas," July 28, 2020

Elizabeth Segran, Fast Company, "Returns are bad for the environment. Pottery Barn wats to do something about it," September 18, 2020

Olivia Heath, House Beautiful, "IKEA is opening a second-hand store in Sweden," September 14, 2020

Urban Drivestyle blog, "Urban Drivestyle builds electric bikes in Berlin, with a European supply chain," May 26, 2020

Ryan McMorrow and Nian Liu, Financial Times, "Chinese iPhone factories cut workers as demand dips," April 21, 2020

6 Empathy challenge

United Nations Population Fund (UNFPA), "Covid-19A gender: A gender lens" March, 2020

Pharmaceutical Technology, "Minority ethnic groups are two-three times more likely to die of Covid-19 in the UK and US," June 15, 2020

Jasmine Garsd, Marketplace.org, "Women three times more likely than men to not work during pandemic because of child care," August 21, 2020

Matt Krentz, Emily Kos, Anna Green, and Jennifer Garcia-Alonso, Boston Consulting Group, "Easing the Covid-19 burden on working parents," May 21, 2020

xClaire Ewing-Nelson, National Women's Law Center, "Four times more women than men dropped out of the labor force in September," October, 2020

Robert Hackett, Fortune, "The danger of 'digital apartheid'," October 27, 2020

Katherine M. Kitzmann, Robert Cohen, Rebecca L. Lockwood, Sage Journal of Social and Personal Relationships, "Are only children missing out? Comparison of the peer-related social competence of only children and siblings," June 1, 2020

Amanda Mull, The Atlantic, "Generation work-from-home may never recover," October, 2020

Kaitlyn Tiffany, The Atlantic, "The women making conspiracy theories beautiful," August 18, 2020

xErin Griffith and Nathaniel Popper, The New York Times, "To do politics or not do politics? Tech start-ups are divided," October 28, 2020

Jon Henley, The Guardian, "Finland enlists social influencers in fight against Covid-19," April 1, 2020

References

Anne Quito, Quartz, "Taiwan is using humor as a tool against coronavirus hoaxes," June 5, 2020

Kate Johnson, LinkedIn Pulse, "A call for courage," August 18, 2020

Michael Grothaus, Fast Company, "Yelp says it will now warn users about businesses accused of racism," October 9, 2020

Larry Clark, Harvard Business Publishing Corporate Learning, "Navigating complexity: Managing polarities," December 17, 2018

eBay news team, eBay news, "eBay launches "Up & Running" to immediately bring small businesses online," April 2, 2020

Rani Molla, Vox, "Netflix parents get paid a year off and Amazon pays for spouses' parental leave," January 31, 2018

Christian Allaire, Vogue, "Yes, those viral Patagonia tags are real," September 16, 2020

7 Rituals lost and found

Francesca Gino and Michael I. Norton, Scientific American, "Why rituals work," May 14, 2020

Mayo Clinic staff, Mayo Clinic, "Coronavirus grief: Coping with the loss of routine during the pandemic," October 13, 2020

Brock Bastian, Jolanda Jetten, Laura J. Ferris, Sage Journal of Psychological Science, "Pain as social glue: Shared pain increases cooperation," September 5, 2014

Lewis Dartnell, BBC Future, "The Covid-19 changes that could last long-term," June 30, 2020

Sarah Perez, TechCrunch, "Meditation and mindfulness apps continue their surge amid pandemic," May 28, 2020

Julian Kheel, CNN underscored, "Premium Calm meditation app memberships now included on American Express cards," May 18, 2020

Taylor Hatmaker, TechCrunch, "Co-Star raises $5 million to bring its astrology app to Android," April 17, 2020

Steve Richmond, The Independent, "Britons have picked up at least five new rituals during lockdown, poll finds," October 12, 2020

Brian Solis, Fast Company, "How Covid-19 created a new kind of consumer in just 90 days," September 8, 2020

Gleb Tsipursky, Intentional Insights, "Autopilot vs. intentional system: The rider and the elephant," November 14, 2014

Jasmine Bina, The Startup on Medium, "When consumer habits fall apart, look for the rituals that remain," May 19, 2020

Frank Cowell, Digitopia blog, "Why brands with rituals will rise to the top," 2020

Amelia Lucas and Melissa Repko, CNBC, "Scavenger hunts, treats dangling from a tree and Covid-19 maps: Candy makers get creative to save Halloween," September 20, 2020

Katie Deighton, The Wall Street Journal, "Microsoft thinks you've been missing your commute in lockdown," September 29, 2020

Sophie-Claire Hoeller, Insider, "China is opening a knockoff Japanese shopping street and locals who miss travel love it," October 6, 2020

Katie Conner, C-net, "Still haven't tried Netflix Part with your friends? Here's how to watch movies together for free," August 17, 2020

Rebecca Sentence, Econsultancy, "Six businesses innovating their product offering in response to the coronavirus pandemic," April 16, 2020

Boomsingapore.com, accessed December 3, 2020

Nellie Bowles, The New York Times, "In lockdown, a neighborhood opens up," May 30, 2020

Robert Williams, Mobile Marketer, "Estée Lauder lets Spotify listeners orders samples on Google Home," October 29, 2020

Sarah Butler, The Guardian, "John Lewis steals a march by opening Christmas shop early," August 24, 2020

Daniel Johnson, Trendhunter, "Shaadi.com created a 'wedding from home' service during the pandemic," August 19, 2020

Fayola Douglas, Campaign, "Klarna invites music lovers to 'Klarnival' to make up for missed festivals," August 19, 2020

Kate Whiting, World Economic Forum, "This app lets sports fans cheer out loud in the stadium when watching remotely," June 17, 2020

Image credits/ sources

Page 7. Woman working from home with child
Credit: Adobe Stock Image

Page 8. Man doing yoga in living room
Credit: Adobe Stock Image

Page 9. Woman video chatting with friend
Credit: Adobe Stock Image

Page 10. Empty side street with closed sign
Credit: Adobe Stock Image

Page 11. Man standing in front of moving subway
Credit: Adobe Stock Image

Page 12. K11 shopping mall
Credit: K11 Shanghai

Page 13. Person standing with smartphone in hand
Credit: Nike

Page 14: Woman smiling and baking
Credit: Amazon

Page 18: Two woman working at picnic table
Credit: Adobe Stock Image

Page 19. Little girl learning remotely
Credit: Adobe Stock Image

Page 20. Website page for Roblox's Lil Nas X virtual concert
Credit: © 2020 Roblox Corporation. ROBLOX is a registered trademark of Roblox Corporation.
All Rights Reserved.

Page 21. Grid compilation of people
Credit: Adobe Stock Image

Page 22. Woman recording makeup tutorial
Credit: RODANE Productions/ Pexels

Page 23. Man working with microchip
Credit: Adobe Stock Image

Page 24. Group of animated videogame characters
Credit: © 2020 Roblox Corporation. ROBLOX is a registered trademark of Roblox Corporation.
All Rights Reserved.

Page 25. Amazon Pharmacy pill bottles
Credit: Amazon

Page 26. Women sitting with child
Credit: Adobe Stock Image

Page 30. Woman working at home desk
Credit: tspoonphoto/ Unsplash

Page 31. Microsoft Teams Meeting Recap dashboard
Credit: Microsoft, used with permission from Microsoft

Page 32. Empty Slack Tokyo office with wall sign
Credit: Slack

Page 33. Man working on computer with child writing
Credit: Adobe Stock Image

Page 34. Woman using VR technology
Credit: Adobe Stock Image

Page 35 [top right]. Website homepage
Credit: Figma

Page 35 [bottom left]. Woman video chatting on tablet
Credit: Adobe Stock Image

Page 36. Fringe dashboard on laptop screen
Credit: Fringe

Page 37. Man working on laptop in tropical island
Credit: Adobe Stock Image

Page 38. Small video camera
Credit: Adobe Stock Image

Page 42. Man paying with touchless interface
Credit: Ultraleap

Page 43. Man sitting in car for contactless grocery pick up
Credit: Whole Foods Market

Page 44. Series of analytic dashboards
Credit: Adobe Stock Image

Page 45. Amazon One touchless technology
Credit: Amazon

Page 46. Geraint Thomas riding bike in a virtual world
Credit: Zwift

Page 47 [top left]. Woman boxing with VR headset
Credit: Adobe Stock Image

Page 47 [bottom right]. Discord platform on different devices
Credit: Discord

Page 48. Finnish rap duo JVG
Credit: Rudi Rok

Page 49. Data storage room
Credit: Adobe Stoke Image

Page 53. Man opening a box
Credit: Adobe Stock Image

Page 54. Heinz from Home cardboard box
Credit: Kraft Heinz

Page 55. Aerial view of distribution center
Credit: Adobe Stock Image

Page 56. Man with tattoos delivering food
Credit: Adobe Stock Image

Page 57. Man using computer and arranging flowers
Credit: Adobe Stock Image

Page 58. Woman packaging groceries for distribution
Credit: Whole Foods Market

Page 59. People preparing to deliver groceries via bicycle
Credit: Whole Foods Market

Page 60. Person riding motorcycle bike
Credit: Urban Drivestyle, UNI Bobber electric bike

Page 64. Man protesting with Black Lives Matter sign
Credit: Chris Henry Photo/ Unsplash

Page 65. Woman volunteering at Bruton Food Drop a community food bank
Credit: Magnus Dennis - magnusdennis.com

Page 66. Man sitting in window booth
Credit: Adobe Stock Image

Page 67. Old woman wearing mask and praying
Credit: Adobe Stock Image

Page 68. Portrait of man standing with hands together
Credit: White Ops

Page 69. eBay Up & Running logo
Credit: eBay

Page 70: Patagonia 2020 Men's and Women's Road to Regenerative Organic Stand-up Shorts
Credit: Patagonia

Page 74: Two girls covered in colorful paint
Credit: Adobe Stock Image

Page 75: Three iPhone app mockups
Credit: Calm

Page 76: Three girls doing skin care routine
Credit: Adobe Stock Image

Page 77: People in wetsuits running into the ocean
Credit: Adobe Stock Image

Page 78: iPhone app mockup with candy
Credit: Mars Wrigley

Page 79. iPhone app mock-up
Credit: Co-star Astrology

Page 80. Virtual Christmas store
Credit: John Lewis

Page 81. Two people cheering in front of a TV screen
Credit: Adobe Stock Image

FJORD TRENDS 2021