



**CONIFER**

**PERSPECTIVE SHIFTING INSIGHTS**

**2020:2021**

**SHIFTING TIDES**

***REFLECTIONS & PROJECTIONS***

DECEMBER, 2020

**A FORWARD-LOOKING PERSPECTIVE ON OUR WORLD FROM CONIFER. INSIGHTS INSPIRED BY OUR OBSERVATIONS, DISCUSSIONS, AND COLLABORATIONS WITH OUR CLIENT PARTNERS IN 2020.**





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# The impact of 2020

## WORK, WORLDVIEW AND SELF

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**Early in the pandemic we were scrambling to figure out how to get exploratory experiences in front of users.** It was ironic: we had an unprecedented opportunity to test ideas with homebound users, but we had a host of new deployment challenges. We've had to adapt a lot in the past 9 months but those changes actually improved how we scope and deploy remote experience testing. **The net result forced us to focus as much on the delivery of the experience as the experience itself.**

— DESIGN & INNOVATION LEADER, TECHNOLOGY

**WHAT?**

**Fiction Novel**

when fiction became fact

An interesting series of developments **"What next?"**

existential dread

**Anxiety**

unsettling

doom scrolling



**Moment of Self-reflection**

metamorphosis

reflection



**time dilation**

eye-opening



**2020  
in a  
nutshell**

2020: The Year When **Onychophagia** Became Widespread and Popular

**desensitizing**

**Adventure**

running the gauntlet disruptive

a wild ride

uncertainty

exhausting



rollercoaster



# REDEFINING WORK

## The journey of remote collaboration, voices from Conifer:

### Resistance

*"As a very social person I did not like this at first, but I have established new routines and found parts of the changes that I enjoy."*

### But, it actually works

*"It still feels surreal that I actually started a new job during the pandemic and haven't yet physically met the vast majority of my colleagues (although I feel like I have!)."*

### And levels the playing field

*"In many ways, it forced people into the same modes of interactions and collaboration. In doing this, it accelerated our adoption of some tools and processes that were much needed for our success."*

### Still, it is not perfect

*"We still need to find better proxies for informal interactions — serendipitous moments at the office that help shape my own thinking around problems."*

### Work from home brings discussion on work and life balance

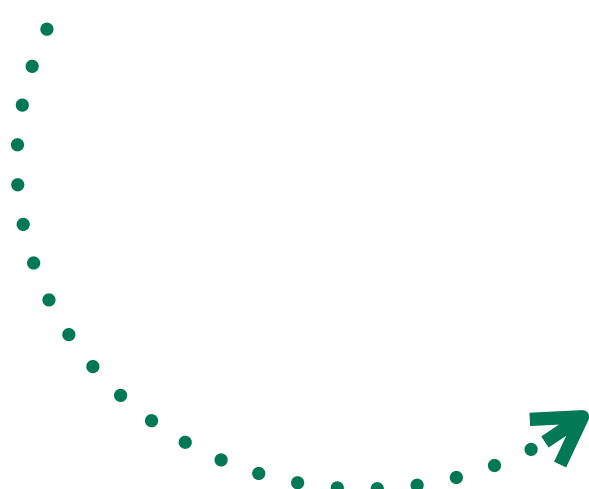
*"Work from home is, thereby, meaningfully cementing the value that employers place on the work/life balance mantra."*



Does it improve for everyone?

**Two key challenges relevant to innovation presented themselves in 2020:** distance collaboration and trend acceleration. Put simply, the pandemic made all previous tactics feel like a dress rehearsal for remote collaboration and innovation. As in the past, those solutions that delivered orders of magnitude in impact will cluster with ones of convenience to create a second wave of innovation that will be exciting to operate in.

— Innovation & Design Leader @ Tech Company





## WORLDVIEW: ALTERED

The diameters of the bubbles that surround us became more present. The pandemic brought our similarities, differences, and humanity into focus and revealed the many connections that were once invisible or taken for granted.

*"I've been **struck by great, heartfelt showings of empathy** in my daily life, from my co-workers to neighbors, and in larger public discourse, especially on issues of race, social justice and access to public health. **At the same time, disturbed** by the serious lack of empathy, globally, that has made life **in this pandemic world sometimes feel like every person for themselves.**"*

*"The world suddenly seemed so small to me — **as we were all going through very similar experiences** (sheltering in place, cooking and baking like we had never done before, hand-washing fifty times a day) no matter which part of the world we lived in. **It was a reminder of our collective helplessness against the power of nature and our profound similarity as humans.**"*

**Necessity really is the mother of invention. No individual, organization, business, or government went untouched; all were stretched in ways thought to be impossible to find and develop proxies for typical and traditional interactions.**

*"On a positive note, humans are more adaptive than they think. **The structures and systems that made our everyday life 'normal' are more fragile than we would have liked to believe.** For instance, all sorts of activities were adjusted onto online and/or social distancing versions."*

*"Early in the pandemic we were scrambling to figure out how to get exploratory experiences in front of users. Understanding of the virus was limited and **we had to creatively identify ways to move forward.** It was ironic: we had an unprecedented opportunity to test ideas with home bound users but we had a host of new deployment challenges."*



# REEXAMINING SELF

2020 has been a year of taking stock of what we can live without and **what we need** to be fully ourselves:

LEARNING TO VALUE AND CHERISH:

*What is ephemeral and what remains a constant in our lives*

*The need for flexibility and patience*

*To be open and willing to experiment with new courses of action*

*Gratitude for simple things*

*Our differences and how to connect in the right way*

*Personal change and growth, shifting priorities to feel balanced*

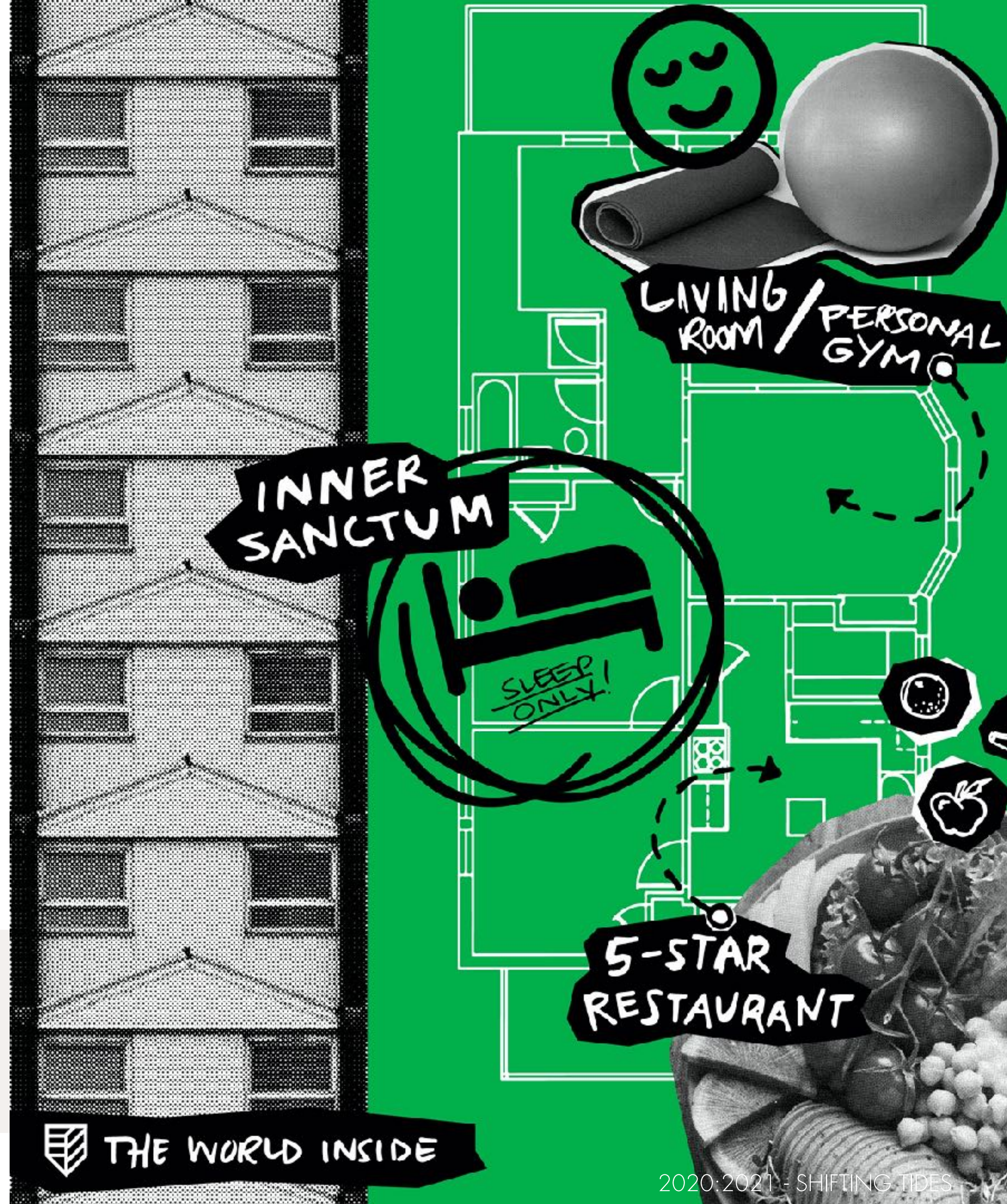
*Living in the present moment with our closest social spheres*

*Prioritizing self-care and 'me' — there is only so much I can take as a person!*

*Self-worth beyond work — I'm more than my job*

*Our daily companions who make everything better: our pets!*

*"Emphasized the need for flexibility and patience — to best adapt to this, I've had to slow down, reexamine situations and priorities, and be willing to experiment with new courses of action. It's been quite challenging at times, but I'm hopeful that it will help me to be a more mindful and intentional person going forward, both in my work and my personal life."*





# 2021 Projections

A LOOK INTO OUR CRYSTAL BALL

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**Sales forecasting** perhaps is the only thing that's really been significantly impacted, as it's very difficult to model launch volumes for products coming out in a Covid or post-Covid world. **I think that will be something we'll just have to deal with for a few years** until consumption (and as a result modeling) stabilizes."

— DIRECTOR OF INSIGHTS & ANALYTICS, CPG



# A CHANGED CONSUMER

## THE 21/90 RULE:

*“ Do something for 21 days, and it becomes a habit. Do it for 90 days, it becomes a lifestyle.”*

### E-COMMERCE & DELIVERY ARE TABLE STAKES

From groceries to household items and healthcare, the pandemic has forced many to migrate transactions online, quickly accelerating and normalizing behaviors that may have been seen as edge use-cases in the days past. With a year of pandemic-disrupted behaviors under our belts, many consumer behaviors will permanently shift. Many brands will continue to need to play catch up to meet consumer expectations and navigate new digital purchasing behaviors and engagement channels.

*Investigate this in your 2021 work through digital shop-alongs.*

### A PENT-UP DEMAND FOR THE EXPERIENCE ECONOMY

Buying stuff during the pandemic? Many people embraced all kinds of new e-commerce and delivery avenues. Doing stuff during the pandemic? A huge pain point. Moving into recovery, brands will ask ever-more-urgently "How does our offering help people DO and not just HAVE?" When consumers are able to return to the experiences that they once loved out in the world, the stakes will be high, bringing opportunity to drive loyalty. *The pandemic provided us with an organic deprivation study on experiences. Explore how consumers have adapted, and what their anticipations and expectations are for the return of experiences.*

### SHOPPER MINDSETS

Supply chain disruptions and shortages have changed consumer purchasing patterns and brand preferences. For some products, loyalty was cemented, while others were diluted by the forced trial of replacements and alternatives. *New opportunities to learn about changes in product journey, brand equity and value levers.*

### MEDIA CONSUMPTION ACCELERATION

Media of all forms continue to be prized companions and one of our primary forms of expression, connection, and a conduit for culture. How people adapted both their home environments and viewing behaviors will continue to be a point of interest, especially since movie theaters and production schedules having been dealt a serious blow. *Marketing & Advertising teams can no longer rely solely on traditional measurement techniques to assess effectiveness and reach.*

### VIRTUAL CONNECTIONS NORMALIZED

Consumers, educators and all generations overcame inertia around technology, and virtual communication skyrocketed. How people continue to connect with one another in a post-pandemic world may permanently shift the cultures and rituals we have around communication and connection. *Where will virtual communication continue to thrive and where will it drop off? How will our relationship with technology change, if at all?*

### CLEANLINESS AND PERSONAL BUBBLES

Expectations around personal space and hygiene will have a lasting impact on business operations and experiences. Companies will seek to meet the needs of the legions of new germaphobes the pandemic has created. Capacity, crowding and needs for personal space and safety will change the way space is designed. *The travel industry struggled to meet the needs for personal space before the pandemic; how will it pivot in the months to come to catch up?*



# A CHANGED SOCIETY

***“Of the many things that 2020 did, one of the most consequential was to throw into relief many consequences of how resources are distributed in society.” - Evan Hanover, Director, Conifer***

## **MENTAL HEALTH MINDFULNESS**

If we're 100% honest, no one survived 2020 unscathed in some way. The experience of the pandemic cultivated a universal sense of empathy for how humans manage disruptive change, trauma, and mental health. Our collective experience through this adversity has resulted in a more open, public discussion about mental health, self-care and self-love. Some brands have even found they have permission to play a role in these discussions and meet customer needs in this space which would have been taboo the same time last year. *As we (hopefully) slowly begin to ease back into 'normalcy', mental health and healing will need to be at the forefront within spaces and communities.*

## **PUBLIC HEALTH IN THE SPOTLIGHT**

If we had been told in 2019 that Public Health would be the number one topic of our time, we would have laughed. Equitable access to healthcare, public health measures, preventions, adequately staffed *and* supplied hospitals, epidemiology and even disaster preparedness plans were mostly invisible before. The heightened attention on Public Health will bring with it a new wave of germaphobes, and also a generation of future public health advocates. *What ground-breaking innovations in our health systems will this future generation be able to accomplish, fueled by their experience of seeing the world come to its knees from COVID-19?*

## **A GENERATION FUELED BY TRAUMA**

The pandemic's effect on our era will be something studied for the next decade, as the impact on children, young adults, young families and the elderly and at-risk are still yet to be fully understood. *The pandemic will become a key generational marker, and research for the next several decades will need to track development, mental models, behaviors and generational trends closely.*

## **DIVERSITY & INCLUSION**

The events of the year have caused a lot of individuals, teams and organizations to blink and take a closer look at their own systems, biases and distributions of resources and opportunities. Disparities became more visible in concretely definable areas, such as access to high speed internet and even in more slippery ideas such as what responsibilities a parent vs. an educator must assume when children must learn remotely. *While a lot of progress has been made in seeing and discussing the challenges and gaps in equity, our work in these areas will never be done. Teams should make space for this thinking in all of their work ahead.*

## **EDUCATION, DISRUPTED**

While the pandemic served as an important reminder of the value of our education system to keep our society functioning, it also highlighted the inequities and resource problems that under-served teachers have been advocating for for years. Many school-aged children's academic year is already being referred to as "the lost year," and research is already highlighting the disparity gaps that have widened for students who lost safe, consistent access to their learning environments. Older, college-aged students have also experienced changes to their norms that may shift the way they think about the value of an in-person education. *Is this the demise of the standard admissions process?*

## **EATING OUT AND EATING IN**

*Culture is food.* Food and restaurant businesses will want to understand how the post-COVID world will potentially forever impact the culture of eating out and eating in. *How will what we cook, make, bake? What will we pay for? How will the mechanisms to up the enjoyment experience of takeout at home change?*



# CHANGED SYSTEMS

*"Sometimes you need to scorch everything to the ground, and start over. After the burning the soil is richer, and new things can grow. People are like that, too. They start over. They find a way."*

- Celeste Ng, *Little Fires Everywhere*

## AI PRODUCTS ARE BROKEN

For all the ground that AI and predictive analytics covered over the last decade, the slate has been wiped clean for many industries that rely on this technology. The disruption to what was measurable and predictable has been completely upended, and with that, the ability to predict outcomes. Many of these tools will need to be completely redeveloped, rebuilt and recalibrated as the world settles into new patterns, bringing years of uncertainty until these tools are proven accurate again. *With challenges come opportunity: companies being forced to start over also have promise of new systems that don't have to conform with broken legacy systems. This will ultimately yield better, smarter businesses.*

## LONG VS SHORT-TERM IMPACT

While large parts of the economy will happily go back to business as normal once they are able to do so, others may be forever changed. Who will grow and thrive from the disruption, and who will have to manage a slower recovery? We expect to see disparities in how industries or companies innovate and move forward past 2020. Brands we look to for world class, reliable experiences may have to shift their own standards and priorities in order to move forward. *Some brands may not be able to afford the same premium touches or expenditures as before, and as a result, utilitarianism may prevail over luxury and premium.*

## SUPPLY CHAINS ABLAZE

Supply chains are notoriously challenging spaces to affect change. Where incremental innovation and risk-aversion were once essential to maintain operations, 2020 provided a case study in true once-in-a-lifetime disruption, pushing basic operations and foundational workflows to the brink. Supply chain chaos was the bane of most corporate employees' existence this year as team members rallied to put out fires and problem-solve on the fly. *Those that made the most of honing their fire-fighting skills are likely to have found new opportunities to evolve and adapt their business basics, and will thrive in 2021.*

## THE NEXT BATTLE: E-COMMERCE & DIGITAL MARKETING

Prior to the pandemic, savvy start-ups and influencer-led brands dominated direct-to-consumer, e-commerce and social media advertising. Others will join in, trying to figure out how to catch up to the norms of online retail channels and how social influence, e-commerce purchase behaviors and impulse drivers differ from the ones they have come to be comfortable with at the shelf. *Understanding the digital paths to purchase, in-the-moment context, channel differences and effectiveness of assets will be essential for product teams.*

## TELE-HEALTH & MAIL-ORDER-MEDICAL, ACCELERATED

If there is an industry known for its inertia, it is healthcare... yet in 2020, the innovation engines were fully activated. Tele-health & mail-order diagnostics are here to stay as providers and patients alike realize the benefits. *Next up: how do we design the full mainstream tele-health experience, from at-home testing and diagnostics and beyond? What are the societal impacts of to better access to care?*



# CHANGES IN INNOVATION

#MRX, INNOVATION & RESEARCH

*“As we enter a new decade, the phrase ‘disruptive innovation’ may bring more PTSD than promise. The way we talk about innovation will need to fundamentally change.”*

*- Sasha McCune, Director, Conifer*

## RESEARCH HAS NEVER BEEN MORE IMPORTANT

Who would have thought that consumer behaviors would be measured by BEFORE 2020 and AFTER? Following these fundamental shifts, market research and investigating the impacts of change is going to be a number one business goal for 2021 and beyond. Many teams have been hesitant to act on research as the landscape is still actively changing beneath us. *Moving into 2021, the ground beneath us will begin to settle, and we can begin exploring the effects and implications with greater certainty.*

## SLATES WIPE CLEAN

Many of the tools we had invested in and continued to leverage in our research, design and marketing work (consumer segmentation, KPIs measurement and modeling tools, innovation roadmaps and even AI/automation) are no longer able to provide us with accurate benchmarking. The behaviors and trends that they once measured have been altered too dramatically to be effective. While it can be disheartening to teams to have lost some of the return of these investments, for some teams this clean slate will reveal powerful opportunity spaces. *Teams will need to audit and plan for rebuilding or redesign of their internal customer intelligence tools, frameworks and segmentations in the coming years.*

## STOP THE ELEVATOR MUSIC

Work streams from on-the-go behaviors, to travel and mobility came to a screeching halt in 2020. Many of these teams had their work do a complete 360, or were redeployed to put out fires in other areas of the business. *Stalled work streams will need to quickly come back to life in 2021 to be ready to stay competitive.*

## INNOVATION LOSES ITS PERFORMANCE EDGE

Now that businesses have seen true “disruption” in ways we never before imagined, some teams may be facing a period of risk aversion, even as things stabilize. Businesses averse to risk can hinder the innovation processes and workflows that teams once held as a gold standard. *Innovation as a practice will have to adapt, become leaner and less performative, prioritizing the backstage work over the inspiration and excitement of innovation theater and workshops.*

## REMOTE ADAPTATIONS & AGILITY

The lessons we have gotten in flexibility will stick with us. Agile, remote approaches are here to stay. We have learned to gain quality insights through remote research workarounds and leaner programs. Remote and agile methods will remain the gold-standard for gen-pop and broad consumer audiences, but limitations exist when it comes to HCI, accessibility, and observation of specific experiences or interactions that can't be replicated through proxies. *As in-person becomes a viable option once again, teams will need to navigate these methodological trade-offs more intentionally than ever.*

## A FOCUS ON BEHAVIOR CHANGE IS CRITICAL

Companies are going to have to contend with the fact that some of the behavior changes they had dismissed as a blip on the radar might actually have more lasting or permanent effects than they thought. *Companies are going to have to monitor customer behavior anew to determine the stability (or precariousness) of changes and adaptations, and plan for multiple scenarios instead of just one.*



# A CHANGED WORKPLACE

*“I wish it need not have happened in my time,’ said Frodo. ‘So do I,’ said Gandalf, ‘and so do all who live to see such times. But that is not for them to decide. All we have to decide is what to do with the time that is given us.’” – J. R. R. Tolkien, Lord of the Rings*

## SENSE OF PLACE BEYOND SPACE

This year has shown that we need to think of "place" as separate from physical space. Certainly, many companies have thrived with an ad-hoc virtual workplace, but that is a far cry from the impact broad adoption of semi-permanent remote work might have on organizations with long-standing office-based cultures. *In a post-vaccine world, habits and behaviors will have changed too much to simply “go back to how things were,” and as a result employee experiences will need to be completely redesigned and redefined.*

## DE-RISKING REMOTE WORK

As teams move from temporary adaptation and workarounds to permanent routines, workplaces will have to assess the many new risks and implications of having a remote work force. Organizations will need to take on Corporate Ethnography research to better understand the human factors of how their employees are adapting and interacting and what the implications are for their company culture, identity and employee experience. *How does a company cultivate culture, manage employees and work, protect its assets and brand, and maintain protocols in a remote-first world?*

## EMPLOYEE BENEFIT RE-CALIBRATION

Many human resource teams will need to reevaluate the best mix of essential benefits in our new world. Employees have seen what the loss of a job or income can mean to all of these benefits. Will there be a societal shift to look upon these "benefits" as part of our human infrastructure? Will we shift toward a system that ensures that the burden of "benefits" are not exclusively borne by workers? *Both employers, providers and governments may begin to rethink their roles and mindsets towards benefits and access to basic essentials.*

## GLOBETROTTING ON PAUSE

With travel on indefinite hold, the previous norms of constant business travel still feel a bit foreign. We don't expect travel to resume until 2022, and even then businesses may hold a higher standard for what warrants corporate travel. *How will this effect global work forces and the dynamics of cross-functional work?*

## CREATIVITY IN REMOTE TEAM BONDING

Teams have had to find new ways to bond and function while separated. Colleagues, employees and managers will need to find new, authentic and sustainable ways to recreate the spark and energy of working collaboratively, both remotely and in-person once again. *What will be the new standards for remote and in-person collaboration in 2021?*



# Silver Linings

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Starting from **day 1 of the pandemic**, I wondered how people went through years of wars, or famine, or other horrible experiences with no end in sight. I have been grateful that at least my **family and loved ones have our health and safety** and lots of support all around us.

NURCA YENER-BOZKURT, SENIOR QUANT MANAGER, CONIFER



## The luxury of working from home and being able to keep a job.

“I am incredibly grateful that the worst thing I can call 2020 is ‘unpredictable.’”

“My gratitude is that we were in one of the **industries that allowed the capability to work from home** while we were Sheltering In Place. I am grateful to be **working with a staff of individuals who continually push** the envelope to deliver for our clients.”

## Higher quality outcomes in worst-case scenario pressure chambers.

“We’ve had to adapt a lot in the past 9 months but those changes actually improved how we scope and deploy remote experience testing. The net result forced us to focus as much on the delivery of the experience as the experience itself.”

“2020 has been the world’s biggest deprivation challenge, and for people like us who study behavior, that’s a silver lining in of itself! It seems like we will be studying the effects of this year for quite some time.”

## A sense of togetherness with friends, family and coworkers.

“I’ve been thinking a lot about the **people who ground me** lately... colleagues who advocate for me (even when I feel down and lost), who will spend 5 hours on a zoom call with me (so that we can maintain a sense of togetherness and collaboration), and who check-in with me on a human level (reminding me that it’s okay to mess up or not feel like putting in 100% every single day of a crazy year).”

“My **commute is now a walk every morning**, rain or shine. I get to have lunch with my family every day.”

## Relief from Normal Pressures.

“The trust, support and understanding of our colleagues during this time. Not needing to overcompensate to show you really are working, even though no one can see you, like they would be able to in an office. **Understanding that days might look different for everyone**, breaks are okay and it is fine to let a slack message to unread.”

“**The events of 2020 felt like grief at first, and then transitioned into a sense of freedom.** I have found that I am grateful for this time to be free from the usual norms/pressures and rules of society, to be free from the travel schedule that was way too intense but had become normalized and expected. To be free from the expectations that come with being polished.”

## Sense of freedom, small joys, increased consciousness of mortality, taking care of self, humanity lived through worse moments in the past.

“**Taking time to appreciate the small joys** – bird watching in the backyard, chatting with neighbors (socially distanced), watching a movie together with your partner, taking up a new hobby, etc.”

“Realizing small pleasures are a **gateway for profound things** in life”

“I’ve realized more acutely **how important it is to take care of myself** and identify what I need to try and be a happy, healthy human. I’m grateful for **friendships that have persisted beyond our physical barriers**, my own space to call home, and for individuals that care for one another amidst chaos and uncertainty.”





# HAPPY HOLIDAYS & CHEERS TO A BETTER 2021

## FEATURES

### HALL OF HOBBIES PAST

Revisit old and forgotten quarantine hobbies in the Hall of Hobbies Past. Bags of flour, unfinished crafts and almost-dead houseplants await you on your trip down memory lane.

### CONFETTI CANNON CELEBRATIONS

With merry evenings of post-project team dinners long behind us, what better way to celebrate than with confetti cannons! Be a master of surprise and catch your coworkers off guard with a package delivered party in a tube.

### THE GRINCH WHO STOLE 2020

You're a mean one Mr. COVID, and we wouldn't touch you with a 6ft pole. The poor Grinch is not to blame for stealing our year — take a closer look at his hat; for there lies the true culprit.

### TOBOGGAN WINE SHOOT

Have your number of rides down the wine shoot also increased at an exponential pace? Jump on a sled with us as we coast down a frozen river of wine for the 3rd time this week.

### FAUCI CLAUS' VACCINE SLEIGH

You better watch out, you better not cry, you better not pout, I'm telling you why. We're so close to vaccines next year!

### SANITIZER SNOWBALL FIGHT

Fun, safe, and sanitizing! Have a snowball fight with us, all while developing good hygiene habits.

### ONLINE SHOPPING TRAIN

Round and round it goes, where it stops nobody knows. The online shopping train, headed by delivery heroes, brings happiness in a box. What "totally necessary" artifact did it bring you?

## CAN YOU SPOT...?

- The Quarantined Elf on the Shelf
- The COVID-19 Virus Which Stole 2020
- The Menorah
- The 2020 Dumpster Fire
- Diwali Lamps

## BONUS QUESTION

What is the first question on the protocol of the two Coniferites on their way to interview The Grinch Who Stole 2020?







# THANK YOU



TO ALL WHO HELPED US FIND THE BRIGHT  
SPOTS AND WISDOM IN A TOUGH YEAR

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@ConiferResearch

[www.coniferresearch.com](http://www.coniferresearch.com)

AND A SPECIAL THANKS TO OUR CLIENT PARTNERS AND  
CO-WORKERS WHO CONTRIBUTED TO THESE FORWARD-LOOKING  
REFLECTIONS AND PROJECTIONS ABOUT THE PATH AHEAD OF US