

MARTENS & HEADS!
EXECUTIVE CONSULTANCY

BEYOND 2020: REFLECTIONS ON THE NEXT CHAPTER

**Survey Results
April 2020**

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A Note From Maxine Martens, CEO

Dear Clients, Candidates and Friends,

We are honored and heartened by your tremendous response to Martens & Heads' questionnaire. The generosity of spirit you have shown in voicing your opinions, predictions and knowledge took our breath away.

Everyone who participated demonstrated thought leadership, from Designers and Creative Directors, through to CEOs and executives in every function including HR, finance, production, sourcing, operations, merchandising, marketing/communications, commercial and omni-channel. Martens & Heads! conceived this questionnaire so that fashion folk around the globe can share expertise, stay connected and discuss the industry's inevitable change. In the following pages, we spotlight informative and inspirational comments and running themes throughout.

What's clear is that people are the heart and soul of our business, and whether we're in bullish times or disruptive times, it's relationships that sustain us. As one CEO noted, "There is huge value in building and maintaining a strong personal and professional network, no matter in what industry, especially during challenging times such as this."

Despite the difficulties we're experiencing and the uncertainty ahead, I don't think I've ever lived through a more empathetic moment in the world. The solidarity, cooperation and tangible support that individuals and companies have shown gives me hope that we'll bounce back with a new vision of how to work better and sustainably provide the dream of fashion to our customers.

We at Martens & Heads look forward to intelligently and optimistically navigating our transforming industry with you.

Maxine Martens

TABLE OF CONTENTS

Please navigate to the page indicated or click the question to jump to that section:

Question 1: Will there be a paradigm shift in thinking about the fashion system?	4
Question 2: What are the characteristics you most value about our industry?	9
Question 3: What is your current state of mind (personally, professionally, or both!)?	11
Question 4: What improvements would you make in your company's processes, structure or systems?	14
Question 5: What hidden talents have you discovered about yourself during this time of reflection?	16
Question 6: What has given you the greatest pleasure during the lockdown?	17
Question 7: What e-commerce site (in any industry) have you discovered during the lockdown that has made your life easier?	18
Question 8: How will these circumstances change the type of talent companies will need going forward?	20

Question 1: Will there be a paradigm shift in thinking about the fashion system? Some people say this has needed to happen for years. Do you agree?

Most survey respondents believe there will be a paradigm shift in Fashion. While a couple others would just call it the natural evolution of Fashion, all respondents can agree that change is inevitable and needed. Many say trends like Digital, Product Seasonality and Sustainability that had already begun to unfold and gain traction are now accelerated. One leader commented, **“We always knew there would be a paradigm shift across all fashion industries; we just never imagined it would come so quickly, without warning and in the form of a pandemic.”** Another mentioned, **“The tipping point just happened in a sling shot!”**

“We have all been talking about the changes that need to be made but couldn't see how the whole system could adapt. Too much retail space, too much fashion, more digital. Covid has caused a complete pause and an acceleration of the changes needed.”

“The shifting elements we had seen emerging previously will continue but at a much faster rate (working remote, dependence on technology, developing quicker response rate, online shopping, popularity of casual & athletic apparel, responsible sourcing, etc).”

The majority of predictions revolve around the fashion calendar and distribution, digital transformation, and sustainability.

Quality Over Quantity: An overhaul to the fashion calendar

As consumers become more conservative with their spending, respondents expressed how they believe quality will be valued over quantity. Consumers **“will not return to buying in such an impulsive manner. They will be more reflective and thoughtful.”** This time has not only drawn attention to how much consumers have, but also what is most important. **“The consumer has now learned what it's like to live with bare minimum and purchasing a lot of new clothing will seem excessive.”**

There was a resounding consensus from many respondents on how essential it is to adjust the product life cycle and the volume the industry is producing; currently there is **“too much product”** with **“little inspiration and differentiation for the consumer.”** Brands need to produce less and provide a curated collection. Each piece will need to be **“special and have a reason to exist”** whether it's because of its value, quality and/or an innovative product.

“I believe there will be a shift to finally address that the system is overloaded compared to demand. I would like to see fewer fashion shows, more in season clothing and more edited inventory.”

Producing less volume challenges the frequency and timing of collections. Brands will evaluate reducing their number of collections and deliveries, along with adjusting to seasons with a **“buy now, wear now”** mentality. With the product being relevant to the consumer in the season she

is buying, and brands carefully choosing what to deliver, brands expect more of the collection will sell at full price.

“Collections and seasons, as well as the moments and places of showing the collections will have to be re-thought.”

“From the product point of view, these retailers [department stores], even though they preach the buy-now-wear-now philosophy, do not practice it at all. This has to and will shift if any retailer, large or small, wants a chance to survive.”

Reducing volume may not purely come through decreasing the number of deliveries due to the consumer’s desire to have newness. **“We have educated the customers to newness all the time to support demand and interest. This will not change. What will change is the amount of product on the market. Less volume and more scarcity as I think the appetite for newness will not change.”**

Lastly, distribution will continue to evolve as department stores’ businesses are being challenged, and brands are shifting from traditional wholesale to e-commerce. **“Traditional wholesale is less relevant; the system has been built off wholesale/ department store retailer base. Even before the crisis, the market shift reflected many different avenues of revenue streams for brands and designers, separate from the traditional department store wholesale models (like DTC channels for example). Those revenue stream models are becoming more and more imperative to the businesses as they become less dependent on traditional wholesale.”** This shift had already begun pre-crisis and is now only being propelled. Some noted the increase in efficiency and profitability in the fashion system, along with flexibility in the calendar that this will bring.

Brand Storytelling and Digital Engagement

Pre-crisis, brands who are on the forefront and experiencing fast growth are those who engage with their consumers in a personal and authentic way, and although with still many frictions, build a sense of community both online or in-store.

Digital is naturally being propelled during this time, making it essential for businesses who have not shifted to adopt digital practices, and those who have begun, to further evolve and improve their systems and infrastructure along with how they engage with their consumers.

Brands will need to evolve and embrace technology and digital for storytelling, consumer engagement and personalization at a greater level. The art of delivering less will allow room to focus and make **“new releases and brand communications more effective.”**

Live streaming and social media platforms will promote a daily conversation, providing **“ways to reach people outside of fashion week,”** for example. Technology will continue to evolve to remove friction across channels and provide a truly seamless shopping experience. For example, will there be greater utilization for Virtual Reality, and how will brands further utilize Artificial Intelligence in personalizing shopping experiences? As one respondent states, **“There will be more focus on how to sell products effectively online and truly understanding what is needed in order to do that.”**

In combination with online, another leader zeroed in on the importance of personalization in stores—**“Great in person experiences in retail 'bricks' will continue to be important, but the show biz of a glitzy and gimmicky will be shunned, and in person consumer experience will require establishing a relationship, even if short in time, with another human that provides care and knowledge, to facilitate the experience of choice...while ensuring the confidence of 'safety' during the interaction especially in the first 12 months after 'reopening' and even once there's a vaccine.”**

Overall, one respondent summarizes the consumer experience as, **“A more digital focused retailing, including a true holistic, seamless omnichannel shopping experience. More interactive and experiential approach with the use of videos, live streaming, social media, more transparent and content-driven storytelling, and stronger customer engagement with the use of AI, VR.”**

Sustainability & Social Responsibility

Respondents believe that consumers will hold brands to high standards and expectations around integrity and sustainability, and there will be a **“great sense of responsibility and ethic”** with the supply chain, environmental impact, and treatment of employees and vendor relationships.

“Sustainability and staple products will continue to be an important lens and customer shopping tendencies will shift.” Brands need to be transparent in the workmanship and supply chain and speak to the consumer about it.

As a leader states, **“the creation of fashion can no longer just give lip service to 'Sustainability'. Expectations will be highest ever for true and real value in the execution of product and business practices to continuously reduce the damaging effect on the planet and climate in all aspects of the creation of fashion...AND not funded by raising the price. Integrity and trust in brands and leadership will be scrutinized in ways that can and will effect the business...hopefully to the greater good of the customer and employee.**

Another leader comments on the consumer perspective of Gen Z, and their interest in sustainable products—**“I am looking over the shoulder of teenagers in my vicinity all the time. I see a massive move away from classic Instagram and current Influencers. They are very much into all sorts of inspirational videos and documentaries that they watch on TikTok amongst other platforms. All the sudden it is more interesting to see how Nike produces shoes compared to how these kicks look on influencer's feet, even if the documentary ends with a virtual shop assistant.”**

Reducing the excess of inventory goes hand-in-hand with sustainable practices. As one respondent commented, **“Long lasting versus single use, slower pace versus the mad fashion cycle velocity we have seen accelerate over the past 20 years. Real, honest sustainability and a focus on what is at the core of each brand will hopefully emerge**

as some of the main themes as we come out of the crisis.”

Consumers will also look for transparency around production and the treatment of employees and supply chain practices. Respondents suggest that consumers will align their purchases and brands they shop with their personal values and ethics.

One leader commented on his prediction of what would be key is, **“Smaller collections, emphasis on local sourcing, more flexibility in shifts of different teams to give employees more time off and guarantee production, and create a more versatile job offer and experience. Fashion should also represent a dream, but our dreams have changed, do we really all want an exuberant and ostentatious lifestyle or are we looking for simplicity, truth, honesty and real experience—the beauty of feeling comfortable?”**

Improving production practices and treating employees with the highest standards is a necessary shift that needs to take place. An executive commented, **“Those models are also inherently unequal and colonial. Today’s reality shows that the risk to the lives of the lowest paid and least protected, now overshadow and imperil our own quest for economic stability and prosperity. Perhaps, in the much-anticipated restart of global economies, we will be more mindful, and have greater respect for workers and teams in our product development, manufacturing, and distribution chains.”**

As one response put it, **“The challenge will be to make these [value] players more sustainable and more responsible. Think about the current disaster in Bangladesh where companies left, took no responsibility at all, and did not pay the bills.”** I am most worried about the weakest link in the supply chain, the workers in Bangladesh and India, when we will see a reduction of the total volume of approximately 30%. No work: no food. I see the need of international responsibility and help.”

The brands who will lead will **“have respect for consumers’ needs and desires and will operate ethically and with a robust sustainability platform.”**

“Integrity and sustainability in everything we do” will be essential, with authenticity being at its foundation.

End of The Department Store Model

One respondent went into detail about the change in the basic business model: **“The fashion system, especially in the US, was and still operating under the unspoken laws dictated by department stores. From the product point of view, these retailers, even though they preach the buy-now-wear-now philosophy, do not practice it at all. This has to and will shift if any retailer, large or small, wants a chance to survive.”**

Department stores dictate guaranteed margins, inventory returns, trade discounts, and each brand’s contribution to their marketing, under different shapes and forms. The buyer takes no responsibility in their buy, because they know they can and will return what they cannot sell. It is a de facto consignment

business, with very little or no risk from the department store. This system created a layer of management that is complacent and relaxed to run a profitable business, where accountability is lacking at every level. The result today is a domino effect of large department stores that are not surviving.

No other industry operates in such a manner. We will see a shift both in product and in distribution.”

Back To Table Of Contents

Question 2: What are the characteristics you most value about our industry?

Over 70% of respondents mentioned **creativity**, often coupled with a theme of **innovation, reinvention, entrepreneurship**. Agility, quick adaptation and problem-solving were other red threads. These building blocks of fashion offer opportunity and inspiration globally, whether they are for emerging brands, heritage brands, independents, or groups.

"The fashion and retail industry has always been an exciting and dynamic space. Fashion knows no limit to its creativity, and we've seen that in all the 'creative outlets' being presented by brands during this time (like Bottega Veneta's virtual residency). It's very exciting to see."

"Creative, historic, inclusive, progressive, multi-cultural, in general. In Luxury brands, the valor of quality, noble materials and skilled artisans who embrace innovation within heritage and craft. I love stepping into the universe they create."

"Working with beautiful materials, innovative fabric mills and resolving design challenges with a creative approach."

"Finding solutions together for new challenges that we find on our way forward."

"No short cuts to great product, it's extremely rewarding to allow people to look good, feel good, and perform 'better' with what we can make and do."

"Craft, savoir-faire, innovation, quality, creativity, cultural reflection, influencing our thinking, dreaming."

"Creating desirability and pleasure in beauty and function."

"The future will have exciting and easy-to-use e-commerce platforms, featuring companies offering transparency and trust, with a foundation of positivity and a sensibility of what is essential."

"That it is an art form people can engage with. That it allows so many people to express themselves in the making of it and in the wearing. Clothes are self-expression. That there are new talents constantly, that although it is not an easy industry, it is one where someone new can make a name and progress and be a true part of it. I think there is still an egalitarian and optimistic soul. I think Fashion sees that there has to be a sustainable foundation and that this effort must be huge and real."

"The never-ending creativity, the inspired collaborations, and the ability to reinvent how we do business."

"History, legacy, overall care for the industry by all actors. Also, most watches and pieces of Jewelry are timeless and pieces of art."

Several interviewees highlighted how talent and vision have aligned with understanding the consumers' needs to grow a brand, keeping the industry extremely dynamic. Moreover, they noted that inherently fashion has the ability to influence culture, elicit change and embrace diversity.

“What I find most compelling about our industry is that no matter what goes on behind the scenes—from social media to press releases to all the analytics and spreadsheets—ultimately, it’s the consumer that dictates success.”

“Fashion is dependent on the customer and data. The past three decades have amplified the need for alignment to customers’ values in speed to market, customization, environmental sustainability, and, more recently, sociocultural awareness. Innovation and novelty are additional competitive differentiators that create space for the creativity and exciting new sensibilities of emerging designers and brands.”

“What I value most about the fashion industry is its ability to capture, reflect, and sometimes heighten the ethos of a moment in human history, using expression to galvanize people around cultural shifts.”

“Creating something bigger than myself. Something bigger than the sum of its parts.”

“When done right, the fashion industry is changeable and adaptable to the times and the culture around us. The change in our industry can happen in a very short period of time. The ones that are pro-active and see this change coming, adjust and survive. Fashion at the end of the day is a state of mind and a state of time.”

“One can learn every day, no matter how much experience one has as there are too many unknowns coming together (weather, customer sentiment, fashion, price, etc). In this industry one can change everything every day, which gives so much opportunity and energy.”

“There is a thread of humanity running through the industry, from the brands to the consumers: these are products designed by people for people, which isn't necessarily true of all categories and sectors. This trait really comes out in times of emergency.”

“I also sincerely appreciate the community aspect of the industry and how people come together in times of crisis. We are in this together and we will get through it together. ”

“The partnership of the community members, the ‘can do’ spirit and the ability to add excite, change points of view and bring whimsy and job to the world.”

“Fashion follows closer than any other industry the evolution of the society in many cases anticipating its changes. Those who create fashion have the ability to read first the changes in the society and translate this in a language that can be understood by many.”

This is what our insiders value in the fashion industry. Let’s be encouraged and remember that creativity and innovation fuel progression, find solutions and foster a compelling desire to bring beauty and excitement to the world.

Back To Table Of Contents

Question 3: What is your current state of mind (personally, professionally, or both!)?

Mixed Feelings Trending Positive

Our respondents' states of mind were characterized by duality. On the one hand, people were brimming with optimism, hope and energy; on the other, there was a steady undercurrent of uncertainty, anxiety and fear. Several of the shorter answers put it simply, offering a variation of the phrase **"Uncertain but optimistic"**. A few acknowledged their mood to be split along personal and professional lives, such as the respondent who put it in these terms: **"Personally: serene. Professionally: anxious."**

Many of our optimistic respondents said they are grateful to be able to carry on without too much financial hardship, at least for the time being, allowing them to use the extra time and freedom to develop personally. One person captured the mood of many: **"I feel inspired, humbled by the experience and blessed to have spent it surrounded with the people I love the most."**

Another was thankful for the gift of perspective. **"The crisis has given us the gift of time and I have utilized this opportunity to be able to take a step back and look at things holistically. Overall I am positive and upbeat, looking forward to the unique challenges and opportunities that are ahead of us. I thoroughly believe that we as an industry can get through this together if we remain positive and motivated."**

At the same time, nearly every respondent did, of course, report feeling worried and concerned. Most were realistic about the state of the world and the industry, and candidly revealed a great deal of stress about the overwhelming uncertainty accompanying the crisis. In our survey, words like **"concerned, uncertain, unsure, vulnerable, holding pattern"** were repeated often. One respondent described their mood as **"mourning"**.

These two poles were well balanced. People's moods were mixed. Everyone acknowledged there is a tangle of good and bad, and the survey results show that most people are attempting to take everything together, as a whole, as they navigate these uncertain times. Here are some examples of this attempt to find balance:

"Optimism balanced with realism; taking into account that there will be this period of questioning but I see such resilience and creativity in the thought leaders in our industry."

"[I] have always looked on the positive side, while preparing for the worse."

"I am full of worry and anxiety about the future, as are most people. At the same time, I feel much more connected to my family and my home, so there is also a new sense of peace and reassurance, in some things."

“My current state of mind on both the personal and professional levels, vacillates between embracing this unique opportunity to take a collective pause and being consumed by anxiety about the future.”

“My current mind is split in two. One that sees all opportunities and ready to change into a new future. Or the flip side, looking at the today's reality which is a mess.”

“Very sad for my son's generation to be launching their lives during this great difficulty yet hopeful for his resiliency as well as the resiliency of our people.”

But among the majority of responses, positivity and hope shone through. This quote is characteristic of many responses we received: **“[My state of mind] fluctuates between fear and hope for the future. Hope wins out most of the time.”** More simply put: **“The best for us, is yet to come.”**

Motivation To Change

Several respondents told us they hope **“[this] global pandemic makes needed change in the world, behavior and certain aspects of consumption.”** The events of the last few months have caused a re-thinking of priorities in the fashion, retail and luxury world.

Some addressed general problems, such as social and economic inequality. One respondent said, **“Undoubtably people were suffering before this pandemic but I hope it will bring more of it to the forefront and trigger the will of all people to see what often goes cruelly unnoticed. Poverty and starvation and inhumane treatment of mankind still prevail largely around the world.”**

Another said, **“I am also quite upset with the large divide of rich and poor that exists in society and the business and that will be amplified by this crisis.”**

Labor practices were on the mind of the respondent who wrote, **“I'm personally disappointed that so much of the fashion industries manufacturing jobs have been exported, leaving a struggle to produce things as basic as masks, hospital gowns, and gloves. We can do a lot better and the industry needs to do a better job of educating consumers about pricing and supporting fair labor practices for factory workers.”**

One respondent addressed the importance of organizations treating their employees well during the crisis: **“Organizations that were there for their employees with total or partial pay/benefits, will differentiate themselves from others and will reap benefits such as loyalty and additional excellence/commitment from their workforce. The American culture is so driven to succeed, it is for that reason that North American region is always the first to be assigned as the pilot for technical implementation, why? because we make it happen! this reminds us of 9/11 when the global community thought our economy would take decades to recover, we proved them wrong.”**

Others expressed industry-specific ideas, such as limiting the number of fashion and trade shows or bringing out fewer collections. Their states of mind were oriented toward a positive embrace of the future, trying to learn from the crisis and reinvent the industry. Several respondents reported they would like to focus on the customer: **“Not lose sight of the customer, in fact I am sure aware of a customer who is going to be different. Who is going to want some of the same comforts and excitements but who is going to demand a new world.”**

Back To Table Of Contents

Question 4: What improvements would you make in your company's processes, structure or systems?

Simplifying

Our survey revealed a general desire to simplify and focus their brands and businesses. For a few respondents, this means a return to their brands' foundation: design. Said one: **We are a wholesale showroom that supports young, emerging designers. I strongly believe this area of the business and matrix is more important than ever so that there continues to be a sense of discovery and differentiation for the end consumer.**"

Another respondent wrote, **"Less of a merchandising approach of making collections, back to real design with experienced and soulful designers, together with carefully formulated objectives based on market survey and necessity."**

A majority of our survey responses also want their organizations to become smaller and leaner. They would like to see their workplace become what one person called a **"light and easy to understand organization."** This person predicted: **"I feel companies will have leaner teams, more generalist professionals versus overly specialized, office environments will be less traditional and remote working will become more common."**

Other respondents were more emphatic about streamlining: **"We must all behave like small companies with everything to lose and everything to gain."** And: **"Strip away anything that doesn't contribute to the brand the and essence of who we are. People, systems, structures. Everything. Because...simplicity is energy, honesty is power and innocence is ability!"**

This kind of simplicity carries over to relationships between wholesale business and their retail buyers. **"We are realistic about a 'new normal' and are planning for virtual market seasons for awhile as we expect buyers will not be traveling for awhile. We still believe that nothing can replace the personal 'see, touch, and speaking about a designer', so we are hopeful that in time, stores will come to buy new collections in person."**

Another respondent addressed the supply chain and buying in more concrete terms: **"Move the supply chain as close to market as possible and rebalance the P&L to allow for it whilst still providing a decent return to shareholders/owners. More rigor in managing Open to Buy with an increase on In Season deliveries and Season-less styles with expanded color options over the whole year."** Other respondents mentioned fewer collections, revision of the fashion show schedule, increasing the nimbleness of the supply chain, and reducing seasons and drops.

"[The crisis] has highlighted the ongoing need to accelerate our omni-channel model, in order to maximize the interplay and benefit of operating the different channels."

Better Integration of Technology

At the forefront of people's minds was technology. The majority of answers to this survey question referenced technology in some way or another. **"The fashion industry needs to**

step into technological innovation in order to progress” reflects a common feeling that technology will be key to moving beyond the current crisis into a new, better model of doing business.

Many want to take advantage of existing technologies to create a seamless, efficient work-from-home structure. Companies must ensure apps like Zoom work for all people working remotely. Cloud-based document sharing and video conferencing must also be paramount. Online opportunities, such as websites and e-commerce, must be maximized.

Thinking Differently

Several respondents have responded to the current situation by re-thinking the very foundations of their businesses. **“Ask yourself ‘the why’ on all issues,”** was one response. Another went into more detail: **“First on the list is challenge your strategy/tactics. [Make] pre/post pandemic comparisons. Second, what you thought was “sacred”, confirm again. Last, check in with your teammates, collaborators and customers. Revalidation of relationships are critical.”**

Re-Focusing On People and Values

Our survey captured a broad and emphatic interest in focusing on the people in their organizations. The health crisis has reminded everyone that **“human connection and compassion are paramount as ever. There truly now is no more room for ego.”** As reflected in respondents’ answers regarding their state of mind, the crisis has allowed for deeper self-reflection about core values and helped spark new ideas about what is really important in the workplace.

Numerous replies echoed the sentiment that people, and their relationship to their employer, are more important than ever:

“Compassion, share, care, emotion with others will have to drive my future professional life even more than before.”

“[We need] a cultural platform of kindness coupled with readiness when the time comes again. The universal connection between heart and head needs to be reinforced. Especially in the workplace.”

“[We need] organizational change through investment in their work force as a way of retaining talent and institutional knowledge important in organizational life after a crisis.”

Back To Table Of Contents

Question #5: What hidden talents have you discovered about yourself during this time of reflection?

We were curious to learn how our network of friends, clients, and candidates were managing personally during this challenging time quarantined in their homes. Some respondents answered with personal talents they discovered while others reflected on professional ones.

Personal

The personal responses' common theme were skills and talents discovered or learned due to the lack of outside services. Many commented on their cooking abilities. Respondents answers were similar, **"I've become quite talented in the kitchen! Having the time to bake and cook has been great"** and **"I rediscovered that I am a good cook!"** Along with culinary skills, respondents have been cutting their own hair (as well as their family members), gardening, deep cleaning their homes, partaking in virtual exercise classes, cycling, hiking, and practicing meditation.

For many in our network, working virtually has become the norm; catapulting traditional work environments to remote. Respondents have been pleasantly surprised by their tech-savviness and ability to learn new software as well as new ways to communicate with their peers and employees virtually. Some have even registered for online courses to improve their digital skills.

Volunteering was mentioned by a few people, including this respondent: **"I do a lot of volunteering tasks in our neighborhood. I drive people to doctor's appointments, bring them groceries, walk their dogs, talk to them thru the glass, or via the phone etc. I did not know that this is so rewarding and that it brings me so much joy. I have decided to keep on doing this after the pandemic."**

Professional

The professional responses were focused on reinvention, preparedness, and managing from afar. One respondent commented, **"This is a key period when you have to, almost you must, review and reinvent how things are done in companies, at the global and local level, so that you become even more agile, you refocus teams on what is essential for the business (so easy to do things because "we always did it before"...)".**

Another respondent reflected on the difficulty of RIF's and cutbacks while working remotely, **"My ability to make hard decisions without letting emotions come into play. Truly understanding my strength as a leader in managing the fallout of layoffs while continuing to keep my team positive about the future. A fine balance, but one I'm really pleased with how I've managed to execute!"**

The overall general theme between both personal and professional responses, were individual's discoveries of immense patience, resilience, and adaptability. Many are surprised by their own compliance and have embraced the new "norm" in a positive light.

[Back To Table Of Contents](#)

Question 6: “What has given you the greatest pleasure during the lockdown?”

Deepening Connections With Family

The overwhelming response to this question was individuals enjoying quality time with friends and family, whether in-person or virtually. Approximately 75% of respondents felt this way and even shared how they are connecting with loved ones now more than ever. One response said, **“Bi-weekly zoom calls with multiple generations of my family. Confusing, but fun to get people from many time zones together at once.”** Another: **“I am seeing my family more both at home and virtually with my extended family. We actually talk more. Also, we are cooking together more which is fun. Lastly, I am reading actual books again!”**

Cooking came up again as a common denominator of pleasure and talent, tied into family time, **“The greatest part, by far, is being with my 3 children and cooking fantastic meals everyday- having, so far, never ordered a delivery! We’ve experimented with all types of cuisines so that even during this time of “physical restraint” we’ve managed to explore the world through food and flavor.”**

One respondent commented that technology brought them the greatest pleasure as it’s the driving force behind communication, **“Technology - it’s been a lifeline. I’m communicating and connecting more than ever with family, friends and colleagues - playing games online together, watching and discussing movies and TV shows and discussing the daily news.”** Another reported loving the chance to **“[read] the NYT, LAT and WSJ ‘cover to cover’”**.

Aside from reaching out to friends and family, reading, long walks, and exercise were also common responses from our network.

Helping Others

Many commented on their ability to help others during this difficult time, personally and professionally, **“I took pleasure in advising pro bono many friends CEOs, from Harvard or just from past experiences, who did not know how to navigate during this crisis either with their bosses or with their teams.”** Another remarked, **“Spending time with my loved ones, be able to help others in difficult circumstances.”**

It was amazing to see the love and support we have given each other. Although we are all experiencing an unprecedented time in history, we have relied on each other to get through.

[Back To Table Of Contents](#)

Question 7: What e-commerce site (in any industry) have you discovered during the lockdown that has made your life easier? Has it given you ideas of how you can improve your brand's e-commerce operations?

Groceries and Supplies: Amazon wins...

Our survey participants have been using online services to stock up on essential supplies, such as food and cleaning products. **“I live on the grocery delivery sites. They have definitely made my life easier.”** Overall, the most common company mentioned was (unsurprisingly) **Amazon**, with a number of people citing **“sometimes daily”** use.

...but not without reservations.

That said, participants were divided on their views on the popular go-to site. While some people have found the ease of placing an order for groceries using Amazon Prime/Whole Foods quite appealing, as well as the ability to chat live with the person picking and packing your order for substitutions, others believe that we may be overusing the site, and taking away from small businesses. One survey respondent simply said, **“Unfortunately Amazon,”** while others answered **“with mixed feelings... Amazon,”** and **“I hate online shopping, but went to it now, but not Amazon!!!”**

Others were equally as direct: **“We must stop using Amazon, I discovered a local producer.”**

This sentiment was echoed by a number of people who have found local, family-owned businesses and restaurants to support during this time, and remarking **“the overall response of small local shops that turned quickly their platforms into digital e-commerce.”** Many of the smaller businesses have taken advantage of apps, such as Instacart, Door Dash, or Uber Eats to provide free contactless delivery and curbside pick-up.

New Discoveries

The concept of thrifting and discovery has also been alive and well for some online shoppers. **“In a way I have rediscovered eBay which is really incredible. People from all over the world can sell their unique items and the thrill of the hunt is real. I have found things on eBay that I have never been able to find anywhere else. It has definitely given me perspective on the excitement factor necessary in e-commerce.”** The site **REBELLE** was also cited.

Another site, called Depop has made an impression on some survey respondents. It is **“community driven with a focus on selling vintage clothes as part of the solution to make fashion retail more sustainable.”**

Several said informative and interesting **podcasts** have been extremely helpful in navigating the uncertain terrain in which we find ourselves.

Staying In Touch

While not technically e-commerce, many respondents cited **Zoom, Google Hangouts, Skype, and House Party** to keep in touch and connected with friends, family, and co-workers, and have also used online apps from **Peloton** and **Nike's** virtual training to stay in shape while quarantined. Other sites mentioned were **Omaze, Sur La Table** and **Cool Materials**.

Takeaways For The Future

Several respondents had specific ideas about how businesses can improve the online shopping experience.

Some suggested that companies give more detailed information about order status. **“All e-commerce sites need to be easier and give better order processing information. (processed, picked, shipped, etc.).”**

Another believes this might create some tweaks in already standard programs: **“I think we can use Ecommerce as an ability for consumers to do their ‘browsing’ and then come to a store near them for a quicker pick-up. Try on and final purchase in order to spend less time inside the store. Kind of like a Click and Collect with a twist.”** Also, **“I feel the future of ecommerce will require all retailers to have live chat, many do already, but feel it will be necessity go forward. Also more 360 views of products, especially for furniture sales.”**

Additionally, one respondent believes that there will be an even more fine-tuned focus on the customer, stating **“I think this experience will help me refocus of what a customer values in a situation of need without a real direct contact.”**

One response highlighted changes in how younger people are using the web: **“I am looking over the shoulder of teenagers in my vicinity all the time. I see a massive move away from classic Instagram and current influencers. They are very much into all sorts of inspirational videos and documentaries that they watch on TikTok amongst other platforms. All the sudden it is more interesting to see how Nike produces shoes compared to how these kicks look on influencer's feet, even if the documentary ends with a virtual shop assistant.”**

When it comes to the insights that people have gained from shopping online, the idea of social responsibility has attracted the attention of some. **“It has been interesting to see how different brands are approaching the ‘give back’ mentality. If you are a ‘give back’ brand, now is the time to put your money where your mouth is! And notice who isn’t.”**

Back To Table Of Contents

Question 8: How will these circumstances change the type of talent companies will need going forward?

Starting At The Top

While the majority of responses answered the question by suggesting the kinds of people executive leadership will be looking to hire, some focused on the executives themselves.

In our survey, the consensus on leadership is that the crisis must change the very foundations of how business is done. One response vividly captures a common sentiment: **“Money for money is over. The companies without real values related to people will die. And not only values written on a board but living values.”**

What are some of those values? Leaders must be **“Highly adaptive and resilient”**, show **“Decisiveness and empathy”**, and **“engage and motivate from a distance”**. Leaders who can **“empathize with consumers in the market will lead their company to a brighter future.”** They must show **“more loyalty and compassion to employees, and to customers, less arrogance.”**

Learning lessons from the pandemic, tomorrow’s leadership will have **“crisis management skills, from keeping their teams motivated while asking them to work harder as they are making sacrifices, to knowing what levers to pull when to make sure the organization makes it through the crisis.”**

One respondent offered advice for current leadership teams:

“I fundamentally believe that many companies will need to refresh their leadership suite post crisis. I am seeing a lot of leaders so focused on the immediate needs of cash preservation which is critical now but not able to flex to reimagine what their company should look like to prosper in the future. It also may burn people out. This is the moment when you need to fully reimagine your business model, let go of sacred cows and why we did things and ask yourself, what is my reason to exist TODAY and how to do I bring that to market quickly and with relevance.”

Beyond 2020: The New Talent Profile

As executive consultants privileged to know the best and brightest talent around the world, we were particularly curious to find out what our respondents see as the type of talent who will be in demand in the post-pandemic world. The responses were so incredibly insightful and detailed that we felt it best to present a simple bullet-point list which we hope will create a mosaic of the traits belonging to the new talent profile.

To begin, there was an overarching theme repeated across nearly all of the responses: the new talent is **adaptable, flexible, resilient**. These words popped up again and again.

Within these broader categories, here is a representative selection of quotes offering more detail about who businesses will be looking to hire as the world re-opens and they begin adapting to the new consumer landscape.

- **Brands will need reactive talent to engage what will be a new type of consumer. The people who will be most in demand will be innovative, empathetic, highly creative, and able to work cross functionally to reimagine how to do business in a new way.**
- **Talent that translates well into online platforms.**
- **Employees will need to be adaptive, resilient, and trustworthy.**
- **Positive, trusting collaborative team.**
- **The heart and head connection within the capacity of talent will be required to sustain businesses and people effectively in the age of the all-knowing and all-transparent digital world we live in.**
- **Talent retention will be a critical concern for many businesses. Remote work will likely become a more permanent fixture for many companies and there are lots of details associated with that. Continuing to go digital will be imperative.**
- **Communication skills that transcend beyond in-person.**
- **Relational skills are at their highest value.**
- **Cross pollination of talent among related industries.**
- **I believe companies will be looking for talent with the demonstrated capacity to navigate through ambiguity and the emotional intelligence to build alliances/coalitions, break down silos, and lead through change. Those high in EQ will thrive. Those who are more rigid and less adaptable will struggle. I do believe this event will be the catalyst for moving to talent marketplaces.**
- **Going forward, companies and brands will need individuals that no longer think out of the box. The new talent is “*THROW THE BOX AWAY*”, look at your business on a daily basis with fresh eyes.**
- **Self-starters who have the ability to build relationships and lead teams remotely.**
- **We need [talent who can] focus on the post-pandemic consumer and offer valid solutions to be able to sustain our businesses.**

- **Taking the best inputs from global, but loyal to local, community minded, humble.**
- **Talent will need the ability to wear multiple hats: designers will need to also be the merchants, merchants will need to be financial planners and/or IT specialists and financial planners will need to be operational experts.**
- **Companies are going to need people who are agile and bring more than one skillset to the table. We've seen a shift over the last eight-or-so years from silo'd Wholesale / Retail / Digital departments to Direct-to-Consumer, and I think that will continue and branch out to other areas of businesses. ... Also, the mindset, or “continuous learning” will be a major factor. It will be important for brands to have people who are on their own focusing on their own personal learning to develop new skills, so that they are well-equipped for another disruption (large or small).**

Back To Table Of Contents