



# The great accelerator

Data, insights and tools  
to navigate brands to a way forward  
in a post-Pandemic world

**EXECUTIVE SUMMARY**





# Outline

## **1. PANDEMIC: THE BIG FREEZE**

The lockdown economy and its impact on consumer behavior

## **2. ENDEMIC: LIVING WITH THE VIRUS**

The "new normal": main short/medium term consumer trends

## **3. LEGACY: TIME FOR A RENAISSANCE(?)**

Main cultural themes of discussion for the future

## **4. TAKEOUTS FOR BRANDS**

The "Covid lesson": brand strategy learnings in the main categories



# “The great accelerator”: impact scenario

## 1. PANDEMIC: THE BIG FREEZE



## 2. ENDEMIC: LIVING WITH THE VIRUS



## 3. LEGACY (post-Covid) TIME FOR A RENAISSANCE (?)

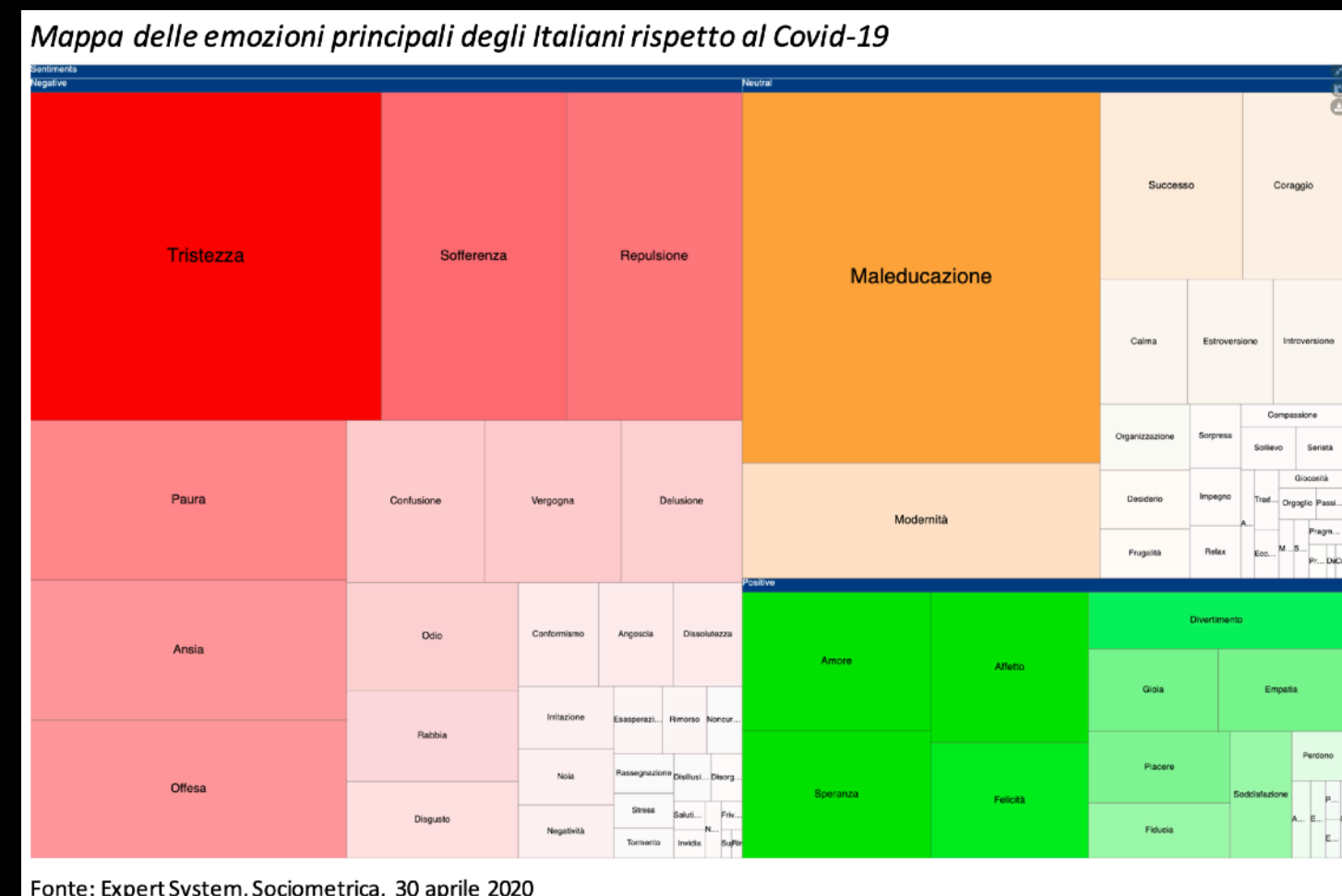




# Pandemic: The Big Freeze

## Macro-overview

### DOMINATING NEGATIVE SENTIMENT



- Fear
- Irritation
- Contagion anxiety
- Uncertainty on what's next

### A QUARANTINE OF NON-ESSENTIALS



- A spike in demand for essential and preventive goods
- Delaying non-essential purchases

### RECONSIDERING AT-HOME ROUTINE



- Home is the new office
- Body is a temple, home is a gym
- Domestic restaurant: delivery and home cooking on the rise
- Remote socializing: video calls and socials

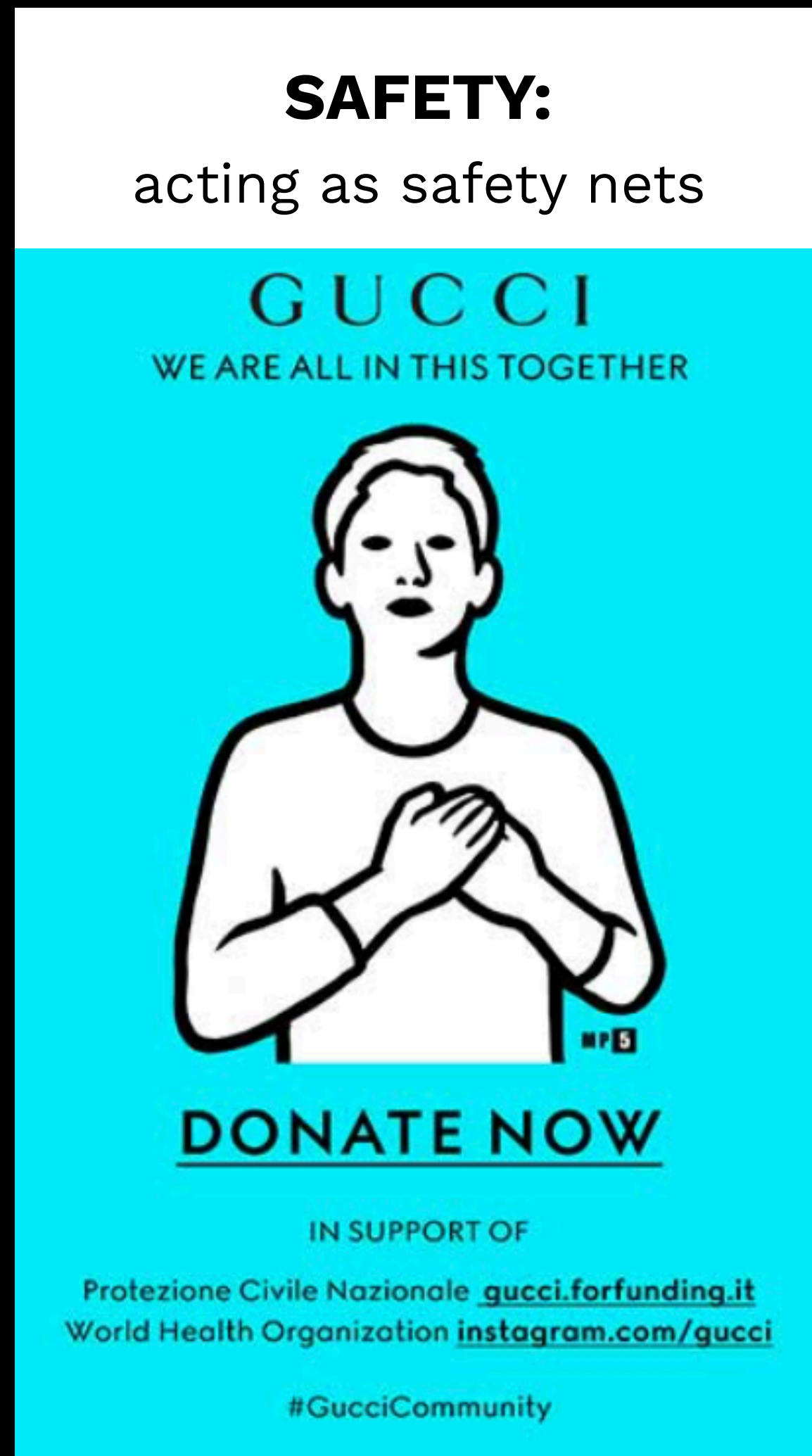


# Pandemic: The Big Freeze

From “wants to needs”: brands were asked to do the right thing

## SAFETY:

acting as safety nets



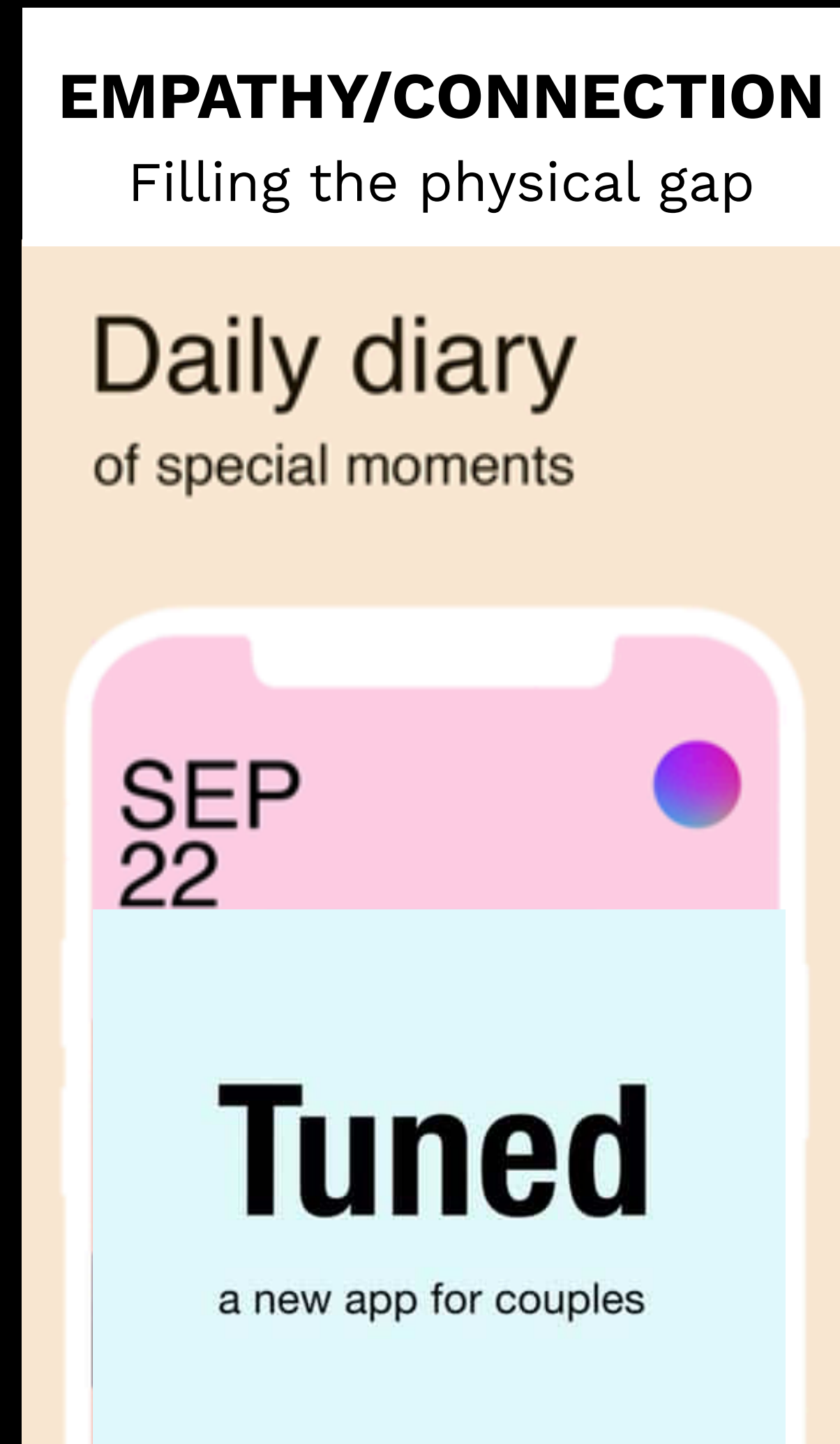
## INFORMATION

reliable news sources



## EMPATHY/CONNECTION

Filling the physical gap



## ENTERTAINMENT

bringing light-heartedness





# Endemic: Living with the virus

Main drivers affecting consumer behavior in the new normal:

## FINANCIAL INSECURITY



## GROWING ECO-CONSCIOUSNESS



## HEALTH CONCERN



## DIGITAL ACCELERATION





# Endemic: Living with the virus

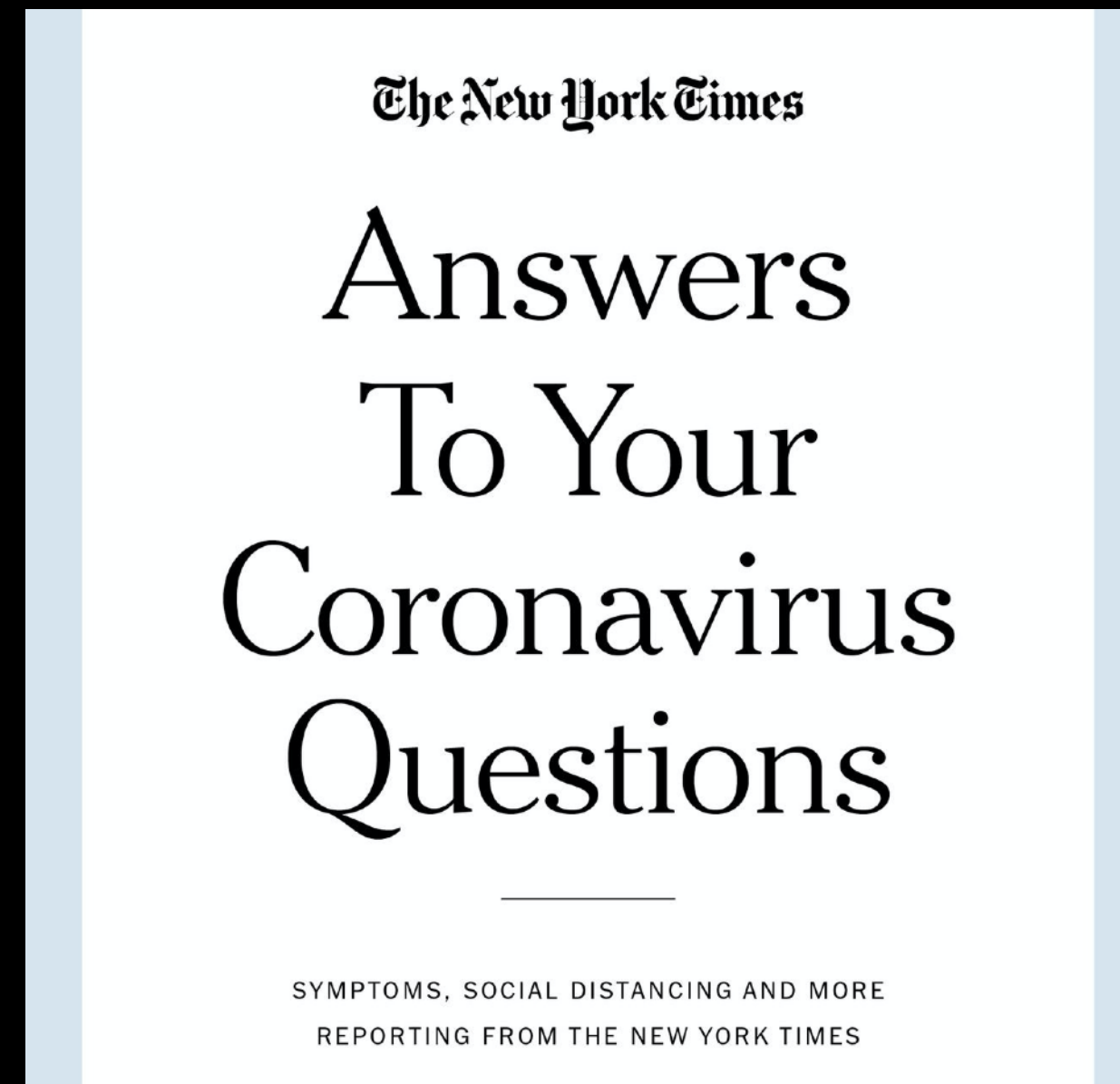
## Emerging attitudes accelerated by Covid-19:

### HYGIENE, SAFETY AND PROTECTION FIRST



THE VIRUS HAS SHOWN US HOW **VULNERABLE** WE ARE, AUGMENTING OUR SENSITIVITY TOWARDS HEALTH, PREVENTION AND SELF-CARE.

### IN EXPERTS WE TRUST



THE CRISIS HAS SHED NEW LIGHT ON THE VALUE OF **COMPETENT OPINION, PROFESSIONAL EXPERIENCE AND ACCREDITED INFORMATION.**

### ACT RESPONSIBLY



**ETHICS, RESPECT, TRANSPARENCY AND PROTECTION FOR THE COMMUNITY AND ON THE WORKPLACE ARE GETTING MORE RELEVANCE IN SUCH A FRAGILE TIME. BRANDS ARE EXPECTED TO BEHAVE AS SOCIAL ACTORS.**



# Endemic: Living with the virus

## Emerging attitudes accelerated by Covid-19:

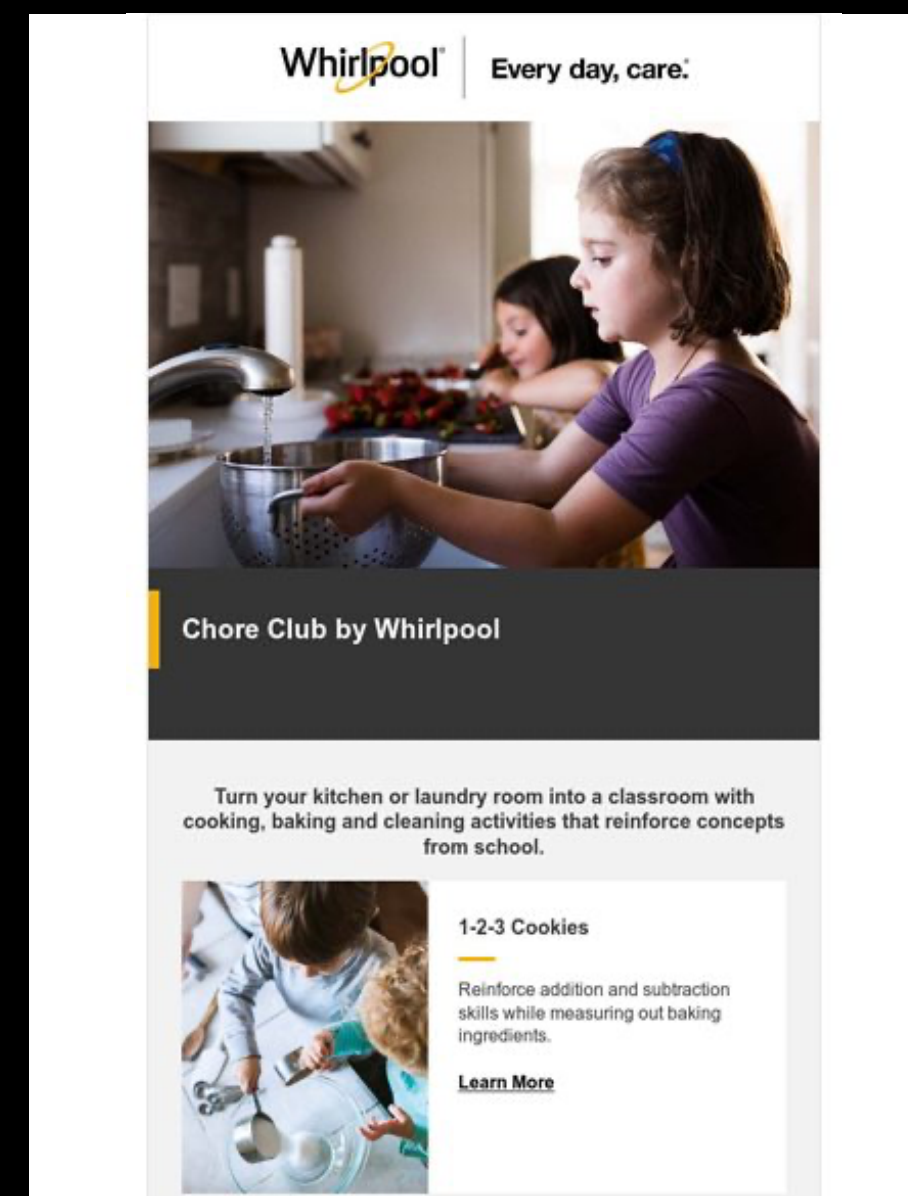
### DIGITAL TAKEOFF



Gucci's new tech bet: Personalised video shopping

A SIGNIFICANT SPIKE IN THE DAILY USAGE OF DIGITAL PLATFORMS, WHICH MIGHT BRING DIGITIZATION TO THE NEXT LEVEL EARLIER THAN EXPECTED.

### SLOW LIVING



RECONSIDERING THE "TO-DO LIST/DOWNPLAY" BALANCE IN THE DIRECTION OF DOWNSHIFTING.

### LET'S HELP



THE EXPECTATION FROM BRANDS TO PUT THEIR PURPOSE INTO PRACTICE AND ACTIVELY SUPPORT WILL BE HIGHER THAN EVER.

### LOCAL IS BETTER



A REINFORCED SENSE OF BELONGING LEADING TO RE-DISCOVERY OF LOCAL PRODUCTS, BUSINESSES AND TOURISM.



# Legacy: time for a Renaissance (?)

Hot cultural themes impacting brands in the near future:

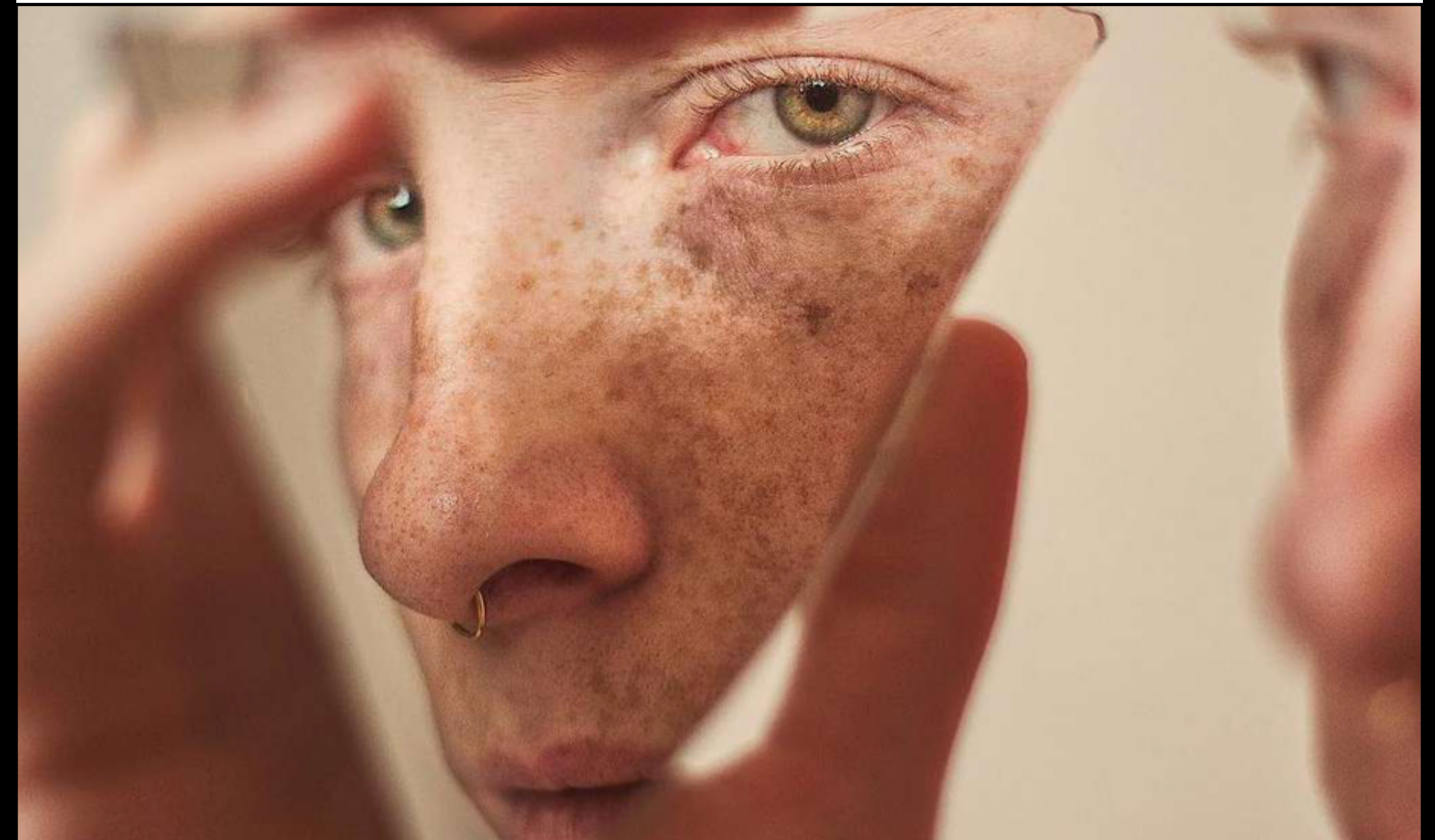
## WE IS THE NEW ME

Awareness and concern that **individual benefits must coexist with collective ones.**



## HUMAN FIRST

**From hyper-performance to human imperfection:**  
embracing our limits makes us stronger, happier  
and more beautiful.





# WE is the new me: accelerating values

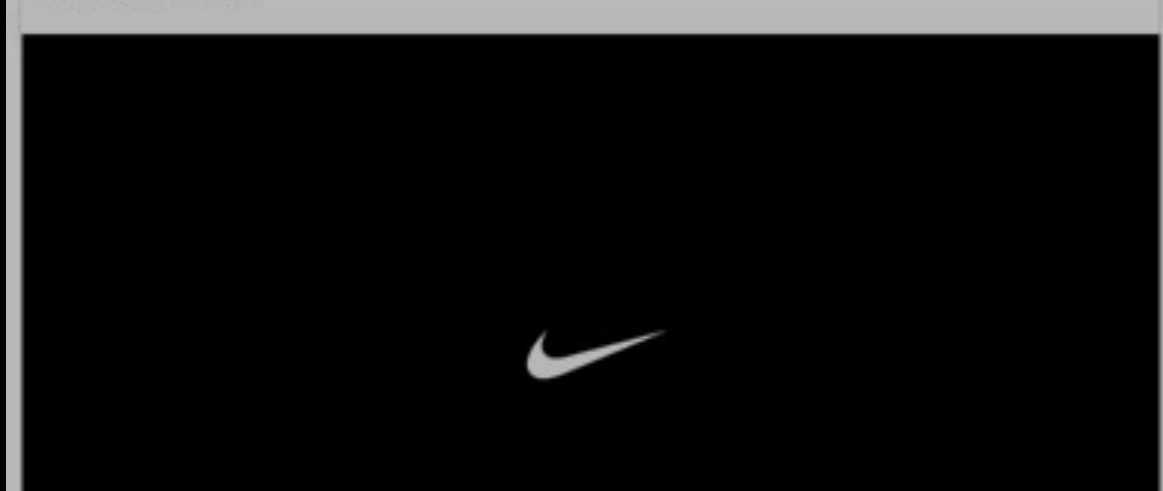
## WE the people

### ETHICS & RESPECT



adidas (at @adidas)  
Together is how we move forward.  
Together is how we make change.

Nike @Nike · May 30  
Let's all be part of the change.  
#UntilWeAllWin



### COLLABORATION

### SOLIDARITY & SOCIAL ACTIVISM



### GLOBAL EMOTIONAL CONTAGION

## WE our planet

### ECO-ACTIVISM



### RE-WILDING

### SUSTAINABILITY/CIRCULARITY





# Human first: accelerating values

## Anti-fragility

RESILIENCE

COURAGE

YOU CAN'T STOP ~~START~~.

IT'S **OK** to not feel ok.

INDIVIDUAL RESPONSIBILITY

I'll make my vote count,  
make my voice heard today.

## May the **limit** be with you

SLOWNESS



ROMA - 2 MAGGIO, 2020  
UN NUOVO UNIVERSO CREATIVO

Sto realizzando, tuttavia, che questa possibilità di raccontare non può essere costretta dalla tirannia della velocità. Oggi sappiamo che era troppo furioso il nostro fare, troppo insidiosa la nostra corsa. E' in questa rinnovata consapevolezza, che sento l'esigenza di un tempo mio, svincolato da scadenze etero-imposte che rischiano di mortificare la creatività. Un tempo capace di sostare in attesa, di attraversare con lentezza anche il dono dell'inoperosità. Un tempo che sappia far respirare la promessa di un'epifania e che sappia indugiare sul sogno, sul gioco, sulla prefigurazione. Un tempo quanto mai necessario per costruire nuove e più potenti narrazioni. Per questo ho deciso di costruire un percorso inedito, lontano dalle scadenze che si sono consolidate all'interno del mondo della moda e, soprattutto, lontano da una performatività ipertrofica che oggi non trova più una sua ragion d'essere. E' un atto di fondazione, audace ma necessario, che si pone l'obiettivo di edificare un nuovo universo creativo. Un universo che si essenzializza nella sottrazione di eventi e si ossigena nella moltiplicazione di senso.

DE-GLOBALISATION

The Economist

the EU's bad crisis  
time and the pandemic  
Starting a business in a slump  
The Mekong dries up  
MAY 16TH - 22ND 2020

Goodbye globalisation  
The dangerous lure of self-sufficiency



MINDFUL CONSUMPTION

Buy less. Choose well.  
Make it last.

VIVIENNE WESTWOOD



# The impact of Covid-19 on industry trends

## TIME FOR A NEW **BANKING**



**THE TURNING POINT:  
CASHLESS IS HERE TO STAY**

**MORE DIGITAL  
NEEDS MORE SECURITY.**

**AGILITY AND PERSONALIZATION  
ARE MORE CRUCIAL THAN EVER.**

**FROM BANKS  
TO DIGITAL SERVICE COMPANIES.**

## PANDEMIC **FOOD** TRENDS



**MORE THAN ITALIAN:  
HYPER-LOCALISM**

**ECO-CHAMPIONS: ITALIANS'  
DESIRE FOR SUSTAINABLE FOOD**

**HEALTH CHAMPIONS:  
CAUTIOUS EATING**

**FOOD IS BACK HOME:  
AT-HOME DINING**

**THE GOLDEN ERA OF E-GROCERY  
AND DELIVERY**

## TOTAL **WELLBEING**



**2021: THE HEALTH MISSION**

**FROM ENHANCEMENT  
TO ENJOYMENT**

**RADICAL RELAXATION**

**LONGING FOR LESS:  
SIMPLIFICATION MATTERS**

**MENTAL HEALTH IS UNDER  
THE SPOTLIGHT**

**RE-ENGAGING  
WITH THE WORLD**

## A NEW KIND OF **ENERGY**



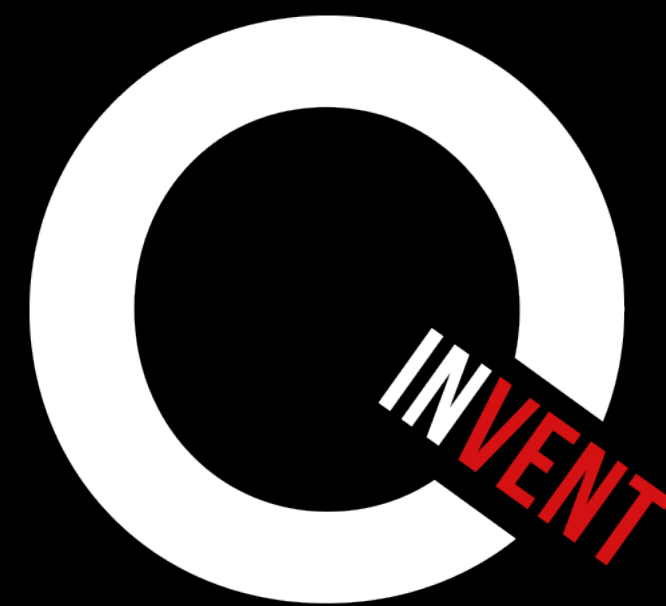
**HOME EVERYTHING**

**THE NEW DEAL OF MOBILITY**

**SUSTAINABLE YET ACCESSIBLE**

**SOCIETY IN DEADLOCK**





Brand Strategy

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