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Covid-19: an overview of customer lifestyle changes and the arising of new trends

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Introduction

Change is inevitable, evolving a condition of existence would be impossible without it.

Change is what anyone is called to undertake, sometimes for personal reasons and motivations, sometimes to respond to a need beyond their control. This concept is suitable to all areas and contexts and it develops differently according to the related sectors of application, but its main definition remains the same: change is transformation, passage from an initial stage to another.

In order to embrace a process of transformation it is usually needed to plan a strategy and to prepare an action plan, whether it be a personal change of individuals or a business development.

But what happens when a change is not planned?

If everything we were sure of is put into restrictions or risks overnight, which effects might take place?

Two-thousand-twenty has been so far a year that has forced everyone to change in a way and for a reason that no one had ever imagined and planned: coronavirus has constrained a large part of the world to stop and hold its breath for weeks, while witnessing the breakdown of all the known economic balances.

Establishing what effects Covid-19 will have on the world population and on the economy is difficult with a pandemic of this magnitude still going on. However, in the following analysis, we tried to outline the main tangible reactions to the quarantine on different aspects.

The study takes into consideration the re-shaping of human behaviors and market trends which occurred starting from Covid-19 spread in EU at the end of February, and it provides data evidences related to the changes mostly occurred in the Italian market from the end of February to May 2020.

Change is presented and examined differently depending on the area of analysis: we tried to identify the effects that the pandemic had from a social and cultural point of view, as well as the evolution that has been taking place in business organizations and in sectors that did not expect a disruptive wave of transformation.

The result is a qualitative overview of the change processes surfacing in three areas considerably affected by coronavirus crisis, that are environment, needs and values, and of how such changes are marking the way to new customer trends and business opportunities.

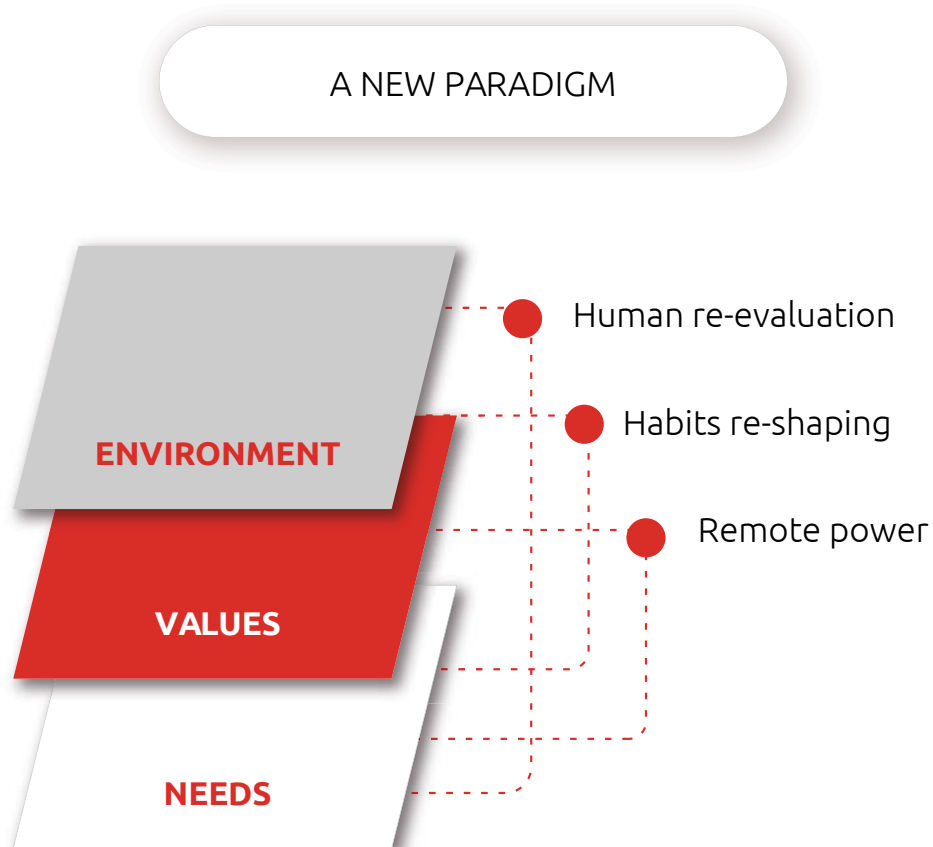
1. A break-down of the known world

The irruption of Covid-19 has mostly produced a considerable amount of tangible changes within three main realms:

- **Environment:** deeply changing the overall known conditions by which people are surrounded
- **Needs:** changing the circumstances in which something is necessary and modifying the perception of “what is really necessary” compared to “what used to be needed”
- **Values:** modifying the relative worth and importance we give to anything

If we try to analyze all the changes related to the above variables and we evaluate them as a whole, we can foresee three possible directions for the future:

- **Human re-evaluation:** intended as the rediscovery of values often overlooked in the day by day routine and a re-found expression of individuals' more human side that shows empathy for another person's feeling
- **Habits re-shaping:** as routines have been blown away by the new circumstances and everyone was forced into a lockdown that shook people's established customs, behaviors and usual way of living
- **Remote power:** because thanks to technologies and networks, the feeling of being "prisoners" has been mitigated



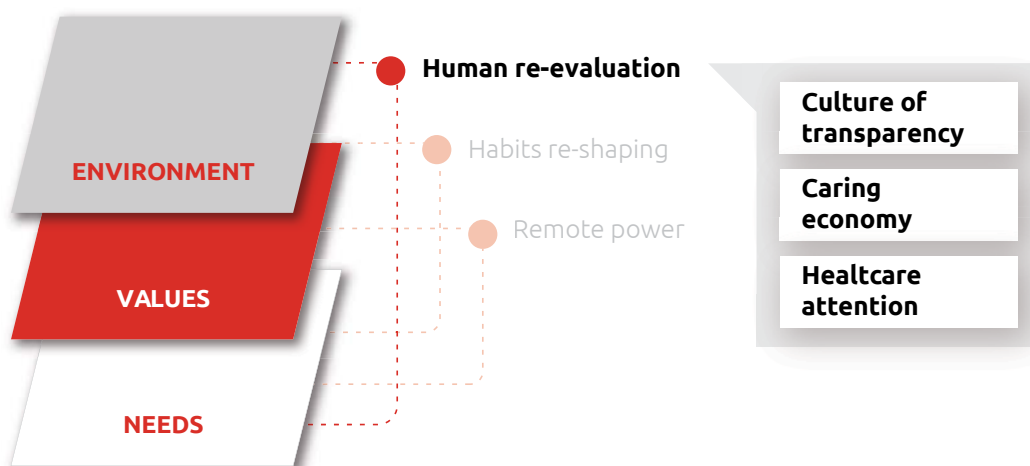
2. Human re-evaluation

Covid-19 has caused people to start being afraid of a friend's handshake and it has deprived everyone of human interactions, making them more valuable than ever.

Individuals started worrying about themselves, their families, their seniors, their friends, their acquaintances, even those they haven't heard of for months. Then came the worries about their work, about those who are losing their jobs, about economy, about the future. Understandably, some people became angry as soon as they started feeling their lives were being stolen from them.

People have been grieving the loss of their loved ones, or of other people they didn't even know, because suddenly everyone had been somehow touched by a common enemy never experienced before.

As soon as the later stages of the lockdown began, people started reclaiming and progressively living their normal life. However, the effects of coronavirus on the most human side of individuals are personal and uncountable, it is possible to outline three main trends.



2.1 Culture of transparency

The immediate reaction to Covid-19 news was an **eager search for more information**. According to Comscore reports in Italy, right after the first detected cases of contagion in Italian northern regions at the end of February, the traffic to news sites started to increase, reaching a +125% in the central week of March. Business and finance websites reported a 90% traffic increase, while local news outlets hit +105% and so did TV broadcast news.

In a context where people were scouting more sources to get further information, **fake news soon made their way into the web**, pushing individuals to refine their researches on trustworthy sources. According to Agcom, in fact, the incidence of fake news on the total amount of news about coronavirus at the beginning of the epidemic was about 7%, and then, as the weeks went by, the rate started to decrease, likely because of the increase of search for more reliable information.

If on one hand, as employees, people **started expecting safety measures and transparent communication from their companies**, on the other hand, as customers they **started paying more attention to the brands they buy from**. Nonetheless, it is not to forget that the tremendous crisis caused by Covid-19 is reducing the economic resources of many customers, which might be forced to evaluate price as main variable for their purchases.

Customers started more actively looking for the place of origin of their purchases, they started ordering food delivery only from trusted restaurants. Then their attention- and judgement- turned to the crisis reactions of their favorite brands: what did they do for coronavirus emergency, did they make any donations, how are they treating their employees, what is happening to their prices, etc. In other words: can they still be trusted?

Employees started reconsidering and judging employers based on the measures adopted in response to Covid-19 outbreak and on the way they felt treated by their companies during the emergency and in the following phases. This may also have had effects on career choices of many people.

Accountability has become crucial now more than ever, and **brands must maintain and enforce their reliability** to the eyes of their customers and employees. **Transparent management and communications will be the challenge of a new culture that demands trust** and is wary of those who show no respect and care about people and causes.

2.2 Caring economy

The spread of the virus and the reconciliation to individuals' more human side has highlighted the willingness to help one another, developing what can be defined a "caring economy", where everyone can do their part *showing they care*.

In the wake of this trend, altruism took many different forms, such as:

- thousands of **crowdfunding** campaigns that raised millions of euros. At first, donations were made mainly to hospitals, but their purpose quickly extended to other activities or categories in difficulty, such as third sector and culture
- **volunteering activities**, led by recognized associations or conducted silently within neighborhoods
- **social campaigns** and **challenges** aimed at increasing awareness about the severity of Covid-19 and promoting the "stay at home" claim, led by influencers, celebrities, brands, or by everyone who wanted to raise their voice
- the **sharing of personal and professional skills** to support people during quarantine and post-quarantine period (e.g. personal trainers, psychologists, nutritionists, etc.)
- a **re-evaluation of affections**, because the inability to see our loved ones has increased the desire to shorten distances, so that instant messages and video-calls have become central in the quarantine routines. According to Comscore data, in mid-March, the visits to instant messaging sites reached +90% compared to data of the beginning of the year

With the arrival of post-lockdown phases, the altruism wave has progressively eased, but the “caring economy” is still present with more private forms, having muted itself in increased attentions given by people to their loved ones.

2.3 Healthcare attention

The Healthcare system has been in the spotlight since Covid-19 started to spread. Hospitals have become the fighting frontiers against an unknown virus, where health workers armed with gloves, masks and unbearable protections have been doing their best to respond to a pandemic that became global within a few days, outlining weaknesses and strengths of each territory’s healthcare system.

Today it is time to make way for innovations that can be key to overcome new episodes of overcrowding of hospitals and clinics’ wards.

Innovative technologies applied to the Healthcare system are already a reality in some countries. In other cases, such as Italy, where a regional-based system suffers tremendous gaps of resources, efficiency and open-mindedness, coronavirus may have created the urgency to pursue topics as self-triage and virtual care. Currently discussed measures are concerned with:

- **Patient education** to reduce risk of contagion by providing information on disease effects and symptoms detection through digital platforms
- **Tele-medicine/consulting** to shorten the distance between doctors and patients and to enable remote treatment without impacting infrastructures already distressed

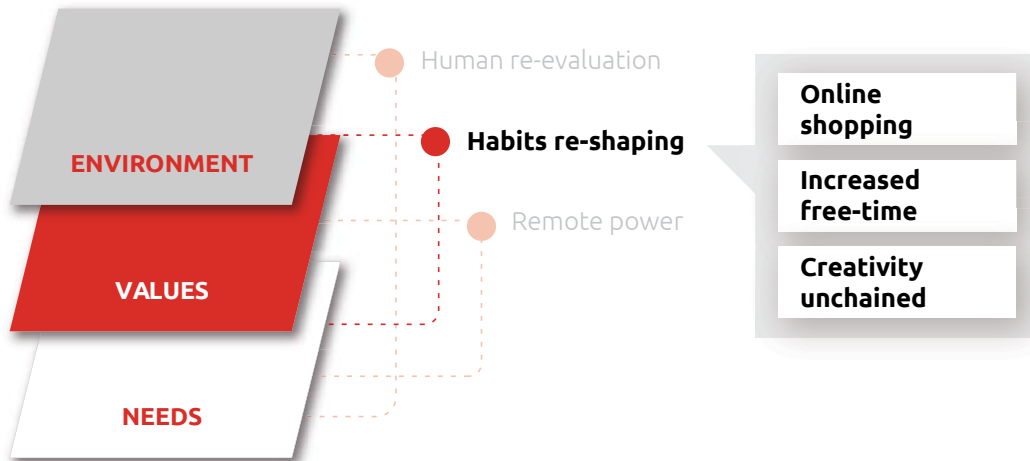
- **Data analytics and Electronic Health Records** to prevent the spread of diseases and to early capture possible hotspots. Or to more easily track and detect cures and treatments that register more positive results on patients
- **Self-health management measures** thanks to digital therapy apps that support people with chronic conditions, providing them with real-time health guidance on a daily basis
- **e-ICU model** (Electronic Intensive Care Unit), that uses a combination of audio-video technologies and advanced reporting capabilities of electronic medical devices, to deliver information about patients to remote caregivers and doctors

Despite being too late for the first wave of the pandemic, it may not be late to gear up for a new wave of the virus that, according to expert's analysis, might be expected next fall/winter.

3. Habits re-shaping

The discovery of a new human centricity together with the huge amount of time citizens have been forced to spend in lockdown - far from workplaces, shops, beauty centers, friends, restaurant, travels and normal life- has shaped a new routine, a new way to spend days behind closed doors. Everything that was easily accessible before became basically inaccessible or forbidden during coronavirus outbreak, and even if the post-lockdown phases progressively restored some old habits, some other new ones have instead taken over and seem to be here to stay, at least for a period of time.

Here again is presented an analysis of the main trends that were born during the quarantine.



3.1 Online over traditional shopping

Given Covid-19 well-known restrictions and the immediate need to fill the house as an anti-atomic bunker with everything that could be useful to individuals' personal response to crisis, the Italians made "virtue of necessity" and understood that it is possible to keep living without cash by experimenting the use of digital payments and online banking, often untrusted and disapproved before, thus giving wings to e-commerce.

Outlining a clear direction for the online shopping would be difficult, considering that each sector registered its proper trend.

The category that reported record numbers in the online demand was the Grocery one: Nielsen data reported +217,3% in the eGrocery category compared to the same central weeks of last year's April. While, if electronic products initially witnessed double or even triple-digit hikes in the online purchases, probably because they were necessary to cope with an immediate remote working need, the stabilization of sales in this sector became evident as the weeks went by.

As stated at the Netcomm Forum last May, Italy registered **2mln of new e-shoppers since the beginning of pandemic**, while in the same period of 2019 they were about 700.000 more. According to the same source, Covid-19 impact has marked a leap towards a global e-commerce growth trend that is expected to grow up to +55% till the end of the year.

However, the sharp turn to online shopping found e-shops unprepared to deal with Black Friday-size demand on a daily basis. It is an act of honesty to say that they, as anyone, did not see it coming.

Coronavirus has put many websites under continuous stress-test, and not all of them came out with a positive result.

The supply chain processes of many companies have been seriously challenged and they will have to equip themselves quickly to cope with a trend that may be slow to settle. Although the situation apparently seems returned to normality for many, it is not to forget that the emergency is far from being globally over and strict social distancing rules shall still be observed. **Hours of queues outside physical shops could probably lead customers to prefer online shopping for many product categories also in near the future, and those who became eShoppers by need during the pandemic could continue to be eShopper by choice afterwards.**

However, while street crimes reached record lows, **an increase of cyber threats and online frauds was witnessed**. This trend draws attention to the need of securing digital infrastructures and educating customers on how to recognize threats and protect their data as they protect wallets in their pocket.

In this climate, some new trends tried to overcome the online shopping's frontiers by opening the doors to **Shop-streaming**, for example, already popular in China, which allows great brands and small shop owners to connect with their consumers and to display their products in a live streaming session.

While e-commerce seems to finally take off in Italy, **in an ever-evolving global market it is already time to talk about how the use of Artificial Intelligence and Machine Learning to re-shape the traditional trade rules through an automated-commerce (a-Commerce), and how this can lead from a "multichannel" logic to an "omnichannel" one.**

The logic of "multichannel" so far has taught to brand how to control different channels to attract customers on several fronts. However, channels can be perceived individually by the customer and can conflict with one another: just think of a communication sent both via sms and by e-mail. "Omnichannel" logic, instead, provides for the integration of all the channels and platforms of a company, to offer customers a seamless purchase experience from mobile to physical store.

In this scenario, **Big Data will be fundamental to integrate all the touchpoints of the customer journey and to develop a predictive demand model that can anticipate the needs of consumers.**

Despite all this might seem futuristic, the use of AI and Machine Learning have already made several steps forward in realities such as:

- **Fashion retail:** where Machine Learning can be used to learn people's personal style and offer daily outfit suggestions based on individual look and, why not, even purchase what is missing from their wardrobe
- **Contact-less shop or self-shop:** as *Amazon Go*, Amazon's chain of employees-free convenience stores, where customers walk in, just take the products and leave the shop without any lines at the checkout

In order to switch to an “omnichannel” strategy, companies might need to re-evaluate and review their supply chain, brand image, data analysis capabilities, cyber security and in general their customer-oriented values.

3.2 Increased free time at home

Lockdown has forced everyone to re-invent themselves and to discover new ways to fill holes left by hours at the gym, in the traffic, happy hours, restaurant's dinners, travels and gatherings of any kind.

The isolation has seen people returning to nurture their personal skills and cultivate passions they had probably strived to follow in the normal pre-Covid-19 life, **and getting time to re-think about forgotten projects, career plans and ways to improve their professional skills.** Moreover, quarantine has witnessed the return to practices like cooking, gardening, cleaning and reorganizing at home, as also witnessed by online shopping data. Similarly, Do-It-Yourself became necessary for even basic needs, such as hair styling or beard shaving, thus making tutorials essential. Not to forget how children begun playing in the courtyards and many parents had to find a way to carve out time from their 24-hour-smart-working-life and start making baby-sitting an additional full-time job, due to the school closure and the grandparents' distance.

Because of the amount of time people were forced to spend at home, media usage increased: in Italy TV programs have registered an extraordinary audience, with also an increase of on demand consume (+46%). Significant data were also registered in the use of social media and radio, which have gained respectively +30% and +25%.

In general, the consumption was different among generations. A global analysis conducted by Global Web Index in April reported in which percentage people said they consumed more of the different media and the analysis showed some interesting trends:

- **Gen Z** (16-23 y.o.): youngers undoubtedly preferred online videos, with an increase of 51%, followed by online TV/streaming (38%) and by the use of video games (31%). Broadcast TV (24%) was almost in line with the use of music streaming services (28%) and online press (21%). Followed instead the consumption of radio, live streaming, books and podcasts, at the expensed of the more traditional media as online press.
- **Millennials** (24-37 y.o.): Millennials were the unique generation which maintained a good balance of use among all types of media. They appeared to prefer online videos (44%), TV and streaming services (41%) also for the consumption of music (35%), moreover they probably were the category more up-to-date and addicted to news consumed both via online (36%) and physical press (19%). Together with Gen Z, Millennials reported to be significant consumers of video games, but presented a good percentage of use of the rest of media as Books, Podcasts, Radio (around 20%) etc.
- **Gen X** (38-56 y.o.): the media consumption of this age group mainly increased in the use of TV: Broadcast (45%) and online via streaming (38%). However, the online use spread also for the consumption of online videos (35%), online press (31%) and music streaming (27%). Still persisted a good percentage of consumption of traditional Media entertainment as Radio (38%).

- **Boomers** (57-64 y.o.): appeared to be traditionalist, and since the beginning of the outbreak their media consumption preferred the Broadcast TV (42%). Just over a 20% of consumption was on online TV and streaming services. All other media, instead, showed a consumption percentage of around 10%.

Considering the time spent at home has been progressively reduced with the end of the lockdown, the above media consumption is likely to have been changed.

In general, anyway, all the new habits created to cope with free time and isolation are not necessarily over: for example, people who started training at home with new training plans created specifically to take advantage of the home environment may choose to continue training at home even if gyms reopened.

Perhaps a way to integrate the new routines with the old ones is needed and the pre-Covid-19 life could be enriched with the new habits.

3.3 Creativity unchained

Another trend that kind of re-shaped people habits was the spread of creativity and arts behind closed doors and in a social media environment that during quarantine became an active 24/7 entertainment source.

Surely, this period gave a **new role to artists and influencers, as they used their social influence to push crowdfunding campaigns and to raise awareness on the virus. Live broadcasting on Instagram became the new TV programming for many people: contents of any genre and interest were available anytime, like music live-streaming performances that are already part of quarantine's fan memories.**

But in a social environment where everyone can reach anyone, everyone can potentially become a content factory. Hence the emerging of new influencing personalities, like personal trainers, psychologists, nutritionists, etc. that gave daily live streaming classes promoting their services and silently raising their user base and business.

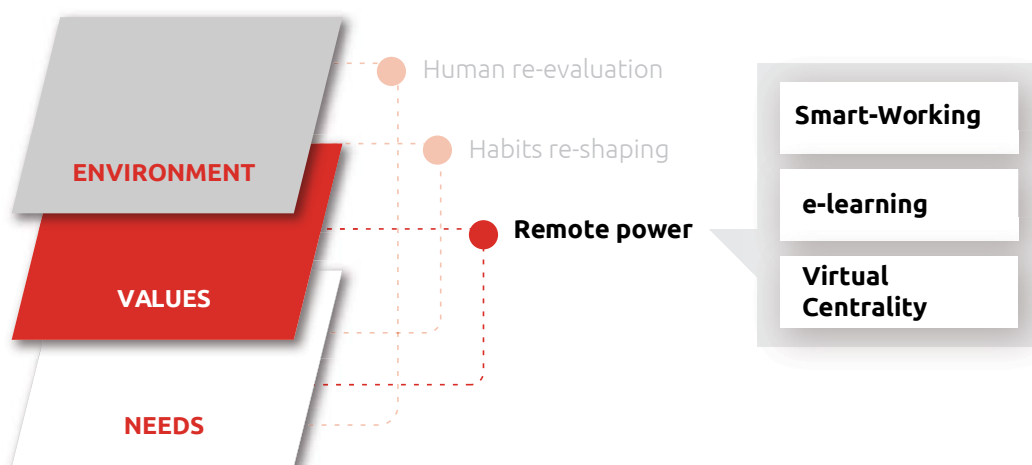
In order to keep the spotlight, **brands started appealing creatively to consumers feelings by creating emotional campaigns and uplifting contents to establish a positive climate of faith and trust**, with an invite to hang on while waiting for the normality to be back. Also, **the high demand of information sources gave space to independent journalism and to the spread of news account on social media and podcasts.** About the latter, from December and March the podcast audience increased by 50% and, starting from March, Spreaker registered an increase of new podcasts of different categories: +700% regarding free time, +600% about education, +500% about arts and +400% about books. Moreover, a Voxnest

analysis reported record numbers in the request for registration as podcasters, which grew by 500% compared to February- hint that many felt to have something to say or express.

However, the main expression of creativity in these days was maybe seen at home where people used creative methods to fix things that would otherwise be repaired by experts and to invent games to entertain kids. Or they simply took refuge in forms of art, be it music, painting or reading, that somehow helped them dealing with quarantine and maybe created a new long-lasting habit.

4. Remote power

The network allowed – and in certain cases still does- most people to keep working, learning and having contacts with their *loved ones*. Quarantine caused confusion and stress, but it also showed that a lot of things are possible directly from the living room sofa. Being forced to live remotely has raised the awareness about what *remote* is capable of.



4.1 Smart-Working

Working from home has suddenly become a necessity for many, rather than an opportunity: while some companies were ready to face it, many others were not prepared and are still struggling to deliver services as they did before.

The different reaction that organizations had is probably in line with the trend of smart-working adoption pre-coronavirus. If we look at 2019 data of Osservatorio Smart-Working of Politecnico di Milano, we realize that the remote working had been introduced by 58% of large organizations, 12% of SMEs and 16% of Public Administrations, for a total estimate of approximately 570,000 employees.

The cause of a non-homogeneous diffusion of the working-from-home practice in all realities can be attributed mainly to two factors:

- **Cultural:** it was widely assumed that certain activities were not suitable for a remote way of working and that physical presence in the office was strictly necessary to perform them adequately
- **Digital maturity:** not all organizations, public or private, had the right tools to manage their activities remotely and this can mainly be attributed to a different level of digitization, for which large companies tend to be more prepared compared to small ones that may still have data storage systems not accessible from outside their premises

The sudden coming of a global pandemic left no room for cultural heritage and gave no time for planning an equipment. So, almost overnight, different contexts had to deal with a government decree that imposed remote work regardless of systems power, tools in possession and technological gaps with competitors or even among the employees.

Nevertheless, today remote working has become a reality for many companies and during the quarantine 8 million of home-workers were estimated. Despite the odds and the difficulties, organizations got to manage remotely day-by-day activities, new projects and internal processes like hiring or transitioning between management roles, while employees got to experience the benefits that such way of working can provide and might not be willing to give up on them when the Covid-19 risk is over.

Lockdown represented a forced test-phase of the practice, however a permanent adoption of it would require appropriate training, equipment and, most of all, a mindset change towards a way of working oriented to results rather than presence:

remote working is a challenge whose outcomes may depend mostly upon management's willing to endorse it and upon employees being motivated, highly committed and self-organized.

4.2 e-learning

The power of the remote has provided possibilities and given opportunities that people didn't even think they wanted to seize, and it has proven that it is possible to do a lot of activities not face to face.

On one hand, if the increase of free time led **people to re-build their personal skills and competencies, on the other hand, the impossibility to conduct face to face activities pushed several institutes to start delivering courses remotely.** The match of demand and supply led to a **massive spread of online classes on several topics.**

In this period, many people embraced **e-learning practice**, starting to take online lessons to refine professional skills or to cultivate personal hobbies as music, photography, fitness, cooking, meditation, etc.: a lot of courses that probably they could not even think to attend before Covid-19, maybe because located far from home or from the workplace.

But on e-learning, **schools have been facing the biggest challenge**. e-learning has become a reality and many students could continue classes thanks to it. However, **even though government directives and guidelines were provided, their applicability was not standard across the whole national territory, because of technological and buying powers gaps among different regions and different sectors of the population**. Consider, for example, that according to Istat in 2019 33.8% of families were not in possession of a PC or tablet at home and only 18.6% were in possession of more than one device.

Between lines this could mean that, **if the digital geographic divide and social gaps are not appropriately bridged, the child population in between might suffer discrimination**.

4.3 Virtual Centrality

In Covid-19 periods, the use of gaming massively increased, also thanks to the fact that a lot of gaming websites went free. According to Comscore, at the beginning of April in Italy the visits to video games sites and apps increased by 31%, which is not hard to believe given the amount of time spent at home.

Moreover, **the use of virtual games was indicated as a safe practice recommended by the OMS** with the campaign #playaparttogether, **that invited people to respect social distancing** by promoting the opportunity to play in community via virtual games.

While using virtual reality to play games, it is easy to start thinking how virtual reality could affect the world of retail, especially given the extraordinary hygiene measures that are being requested by authorities to avoid contagions. How is fashion going to react?

Virtual simulation of shops and virtual status symbols could be closer than we thought, and they could promote different new business models and monetization opportunities.

Let's take for example ***Drest app*** – from a partnership between Drest and Gucci-, a gaming app that engage users to dress avatars in fashion challenges and collect credits to buy famous brands' garments on the online luxury fashion retail platform *Farfetch*.

And once again, in a period that witnesses the closure of stadiums and arenas, how can virtual reality help Sport or Music industries deal with a ban on gathering?

eSports today is already a reality and, with the suspension of all Sport events, its practice increased by 30%- 40%, according to Il Sole 24 ore. During quarantine, MotoGP-Virtual Race on TV helped people to cope with the absence of real MotoGP, while in July the first European eSport football championship was won by Italy for the first time.

The convergence between sports and gaming strengthens, highlighting the need for new regulations or professional figures, such as specialized “digital” lawyers, who can manage a practice born as a game but now became a business of millions of turnover and audience.

5. Conclusions

The analysis presented has no claim to predict the direction that changes we are witnessing will take, but it is visible how Covid-19 is modifying social and commercial rules and it is natural to wonder if these changes will persist when all pandemic risks are over and what else is still going to happen until then.

Individuals are remaining marked by this experience in different ways, that will be reflected by the community that each one lives in. Sociological thinking teaches us that a profound alteration over time of common behaviors, human interactions, relationships, cultural values and norms determines a “social change”. It can be driven by social movements as well as by external factors that causes disruptive shifts in the status quo, that in case of this study can be represented by the status quo of environment, needs and values as they were before Covid-19.

As presented in the study, the change is reflected as well on organizations and businesses of every size and it is affecting macroeconomic balance more than we can define, but if transformation is the key to progress, maybe resilience is the right attitude for embracing it and see where it can lead us.

How to welcome change is an organizational decision, however being ready for it might require the strengthening of existing competences or the acquisition of new ones. This is probably a time that will gradually see the re-shaping of professional figures that will demand a turn of corporate mindset capable of supporting and promoting the necessary re-skilling.

It is up to management to understand that sometimes it may be easier to recover missing expertise by creating profitable partnerships with specialized companies, to take advantage of their know-how and functional resources or to bring in new service logics, rather than acquiring the missing skills needed by their own.

What seems undoubted is that all businesses will face a challenge that goes beyond mere "change", but that accentuates the concept of personalization to align with the differences that may exist in the actions and reactions of consumers with respect to progressive return to normalcy. If on one hand, in fact, the significant changes in habits could be long-lasting and supported by precautionary and fearful moods, on the other hand many people are frantically searching for lost habits, through almost ritual and commemorative behaviors of the pre-Covid life.

Such dichotomy amplifies the need for companies to invest in user research - on experience, usability and positioning of their brand - to identify which patterns of the dialogue and interaction with the customer might need to be (re)designed.

The results of a research, for example, will allow organizations to decide whether to invest in a remote customer engagement that meets the customer base oriented towards prudence, or in technologies and operations that realize a true omnichannel model, enabling a fluid experience between physical and virtual and cater both to customers who are not deployed towards any extreme behavior and to those who yearn for a reconnection with old habits.

Further benefits may derive from a renewal of the brand identity, in order to tune it to values that during the emergency acquired greater importance in the eyes of customers, such as transparency, involvement in social causes and attention to the needs of customers and employees.

The purpose of these interventions is to reduce the uncertainty of a change and to increase trust in innovative models that allow corporate organizations to be successful in a context characterized by great instability.

We at **BIP** have made the *change and the integration* the key to our success and to the growth of our services, and through innovation we have been guiding different organizations towards the new norms that the market has imposed over the past years.

We design an environment where effective behaviors can spread organically, helping organizations to ***shape their culture*** in the physical-digital world.

We reshape the experience, leading organizations to build and design their ***experience strategy*** and brand identity through all digital and physical touchpoints or helping them to develop platforms specific for their needs

We introduce organizations to technology, and we ensure ***digital protection*** for them and for their customers.

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