

BRANDS AND COVID-19

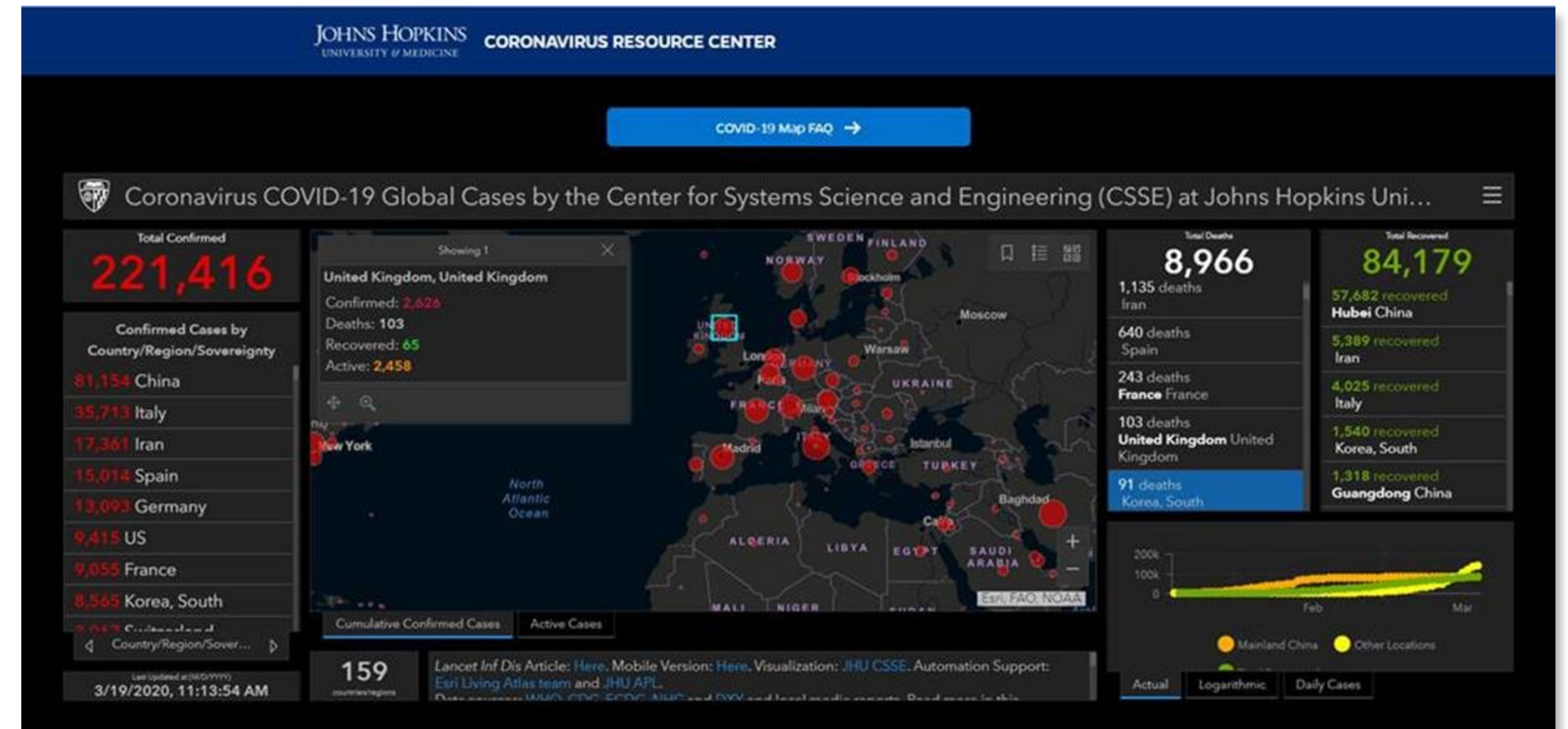
A FRAMEWORK FOR RESPONDING
WITH STRUCTURE YET FLEXIBILITY
TO MAXIMIZE BUSINESS CONTINUITY
IN A TIME OF GREAT FLUX

WHERE ARE WE NOW?

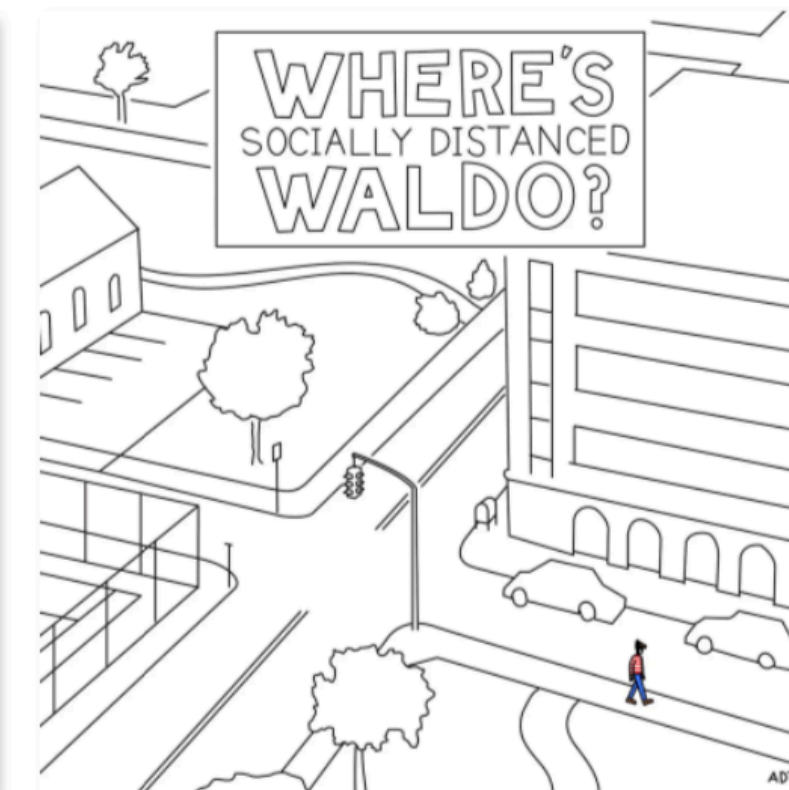
We have never had a clearer picture of what's happening, yet known so little about what comes next.

In this moment, consumers are worried, isolated and life is on pause.

Brands are looking for ways to maintain business continuity in the moment, and guidance for how to prepare to bounce back quickly amidst economic uncertainty and an impending recession.



WE ARE WORRIED



WE ARE ISOLATED

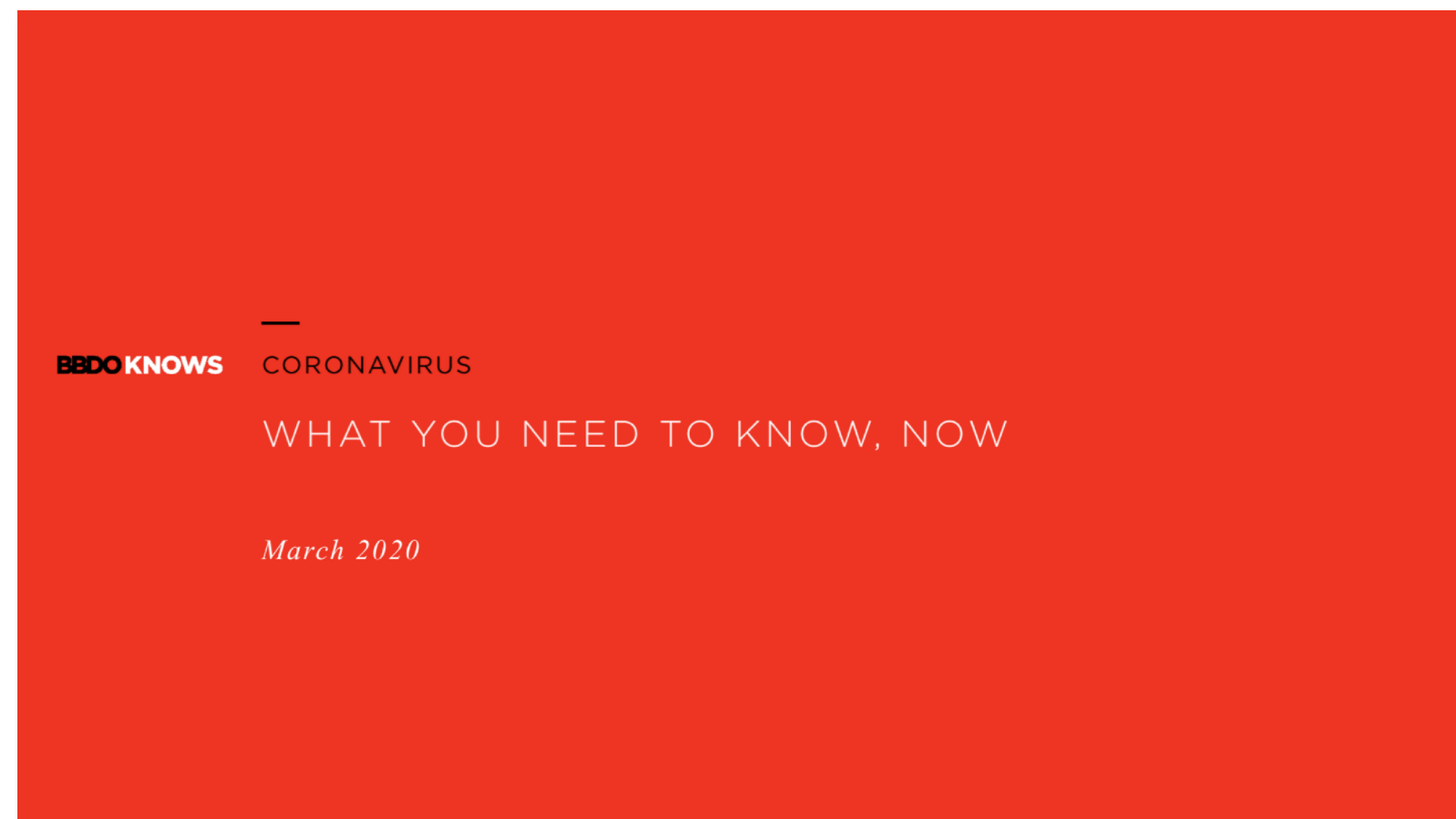


WE ARE ON PAUSE

HELPING TO SEPARATE THE SIGNAL FROM THE NOISE

We want to help our clients move forward with some confidence, and agility to maximize opportunities for business continuity.

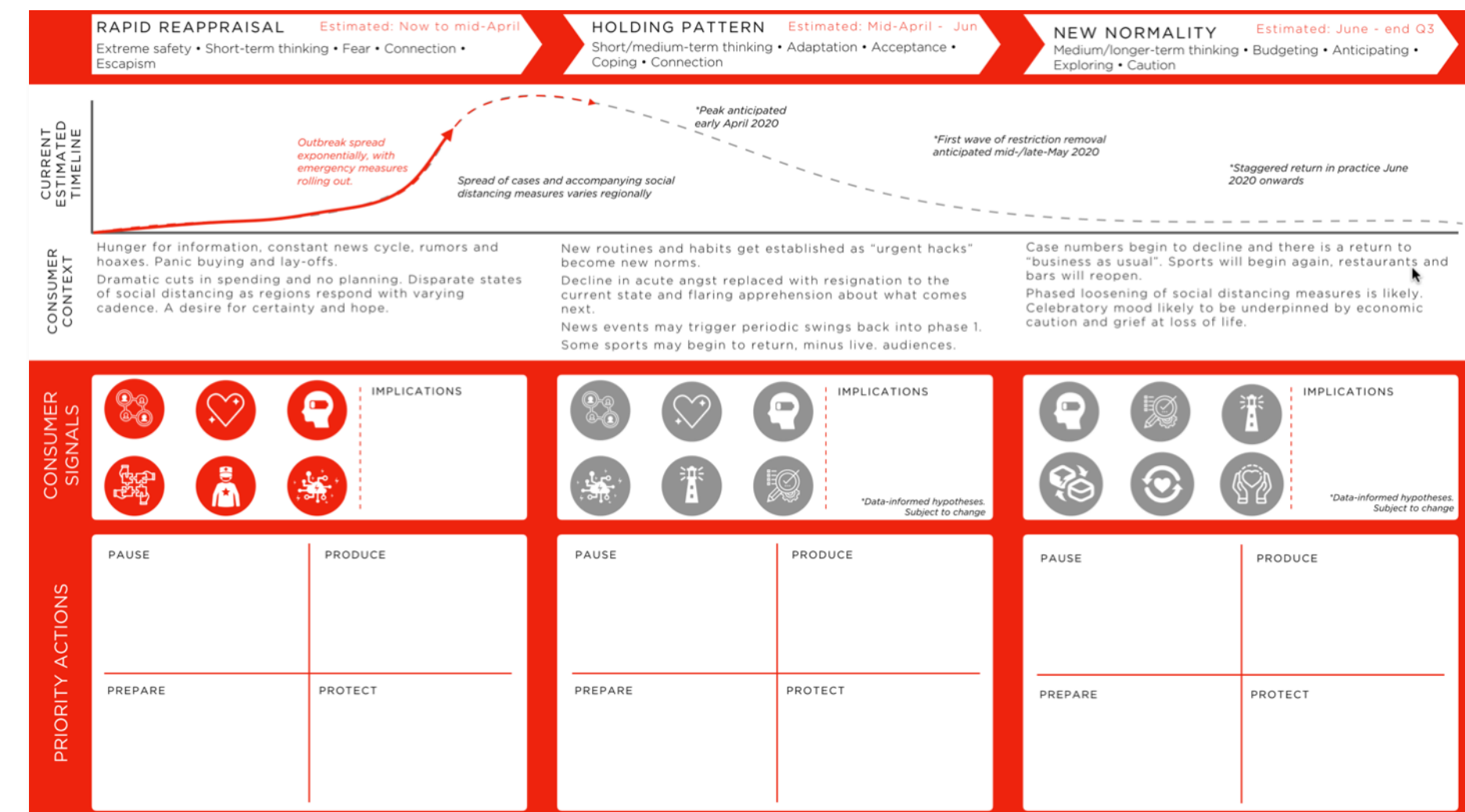
CURATED CONTENT



An in-depth report on early consumer behaviors and implications is available for download, along with daily updates.

Subscribe to BBDO Knows reports and updates [here](#)

A FRAMEWORK FOR BUSINESS CONTINUITY



A framework to guide thinking and prioritize jobs-to-be-done in line with shifting realities and consumer needs and motivations.

WHAT'S THE PURPOSE OF THE FRAMEWORK?

In this moment brands need structure and flexibility to be successful.

As the realities of the situation are evolving rapidly, so too do the parameters of appropriate brand responses.

Meanwhile it is essential that brands are able to forecast the moment that they can

In such a state of flux relying on traditional marketing funnels alone will not be enough to achieve necessary business impact in the immediate term.

In order to succeed in such unprecedented times, brands need to:

- Be able to operate with agility and pivot in the moment;
- Scenario plan for multiple future-states;
- Develop branded and commercial initiatives, with associated messaging & content pre-made and ready to activate when appropriate;
- Develop maximum creative impact in good, fast & cheap ways.



HOW WILL DATA KEEP US INFORMED?

Utilizing the insights that can be found with data, and the ability to track in close to real-time, BBDO is taking a data-informed approach to consumer understanding so that we can help our brands to respond appropriately to current states, and to game-plan effectively for potential future states, and maximize business continuity throughout.

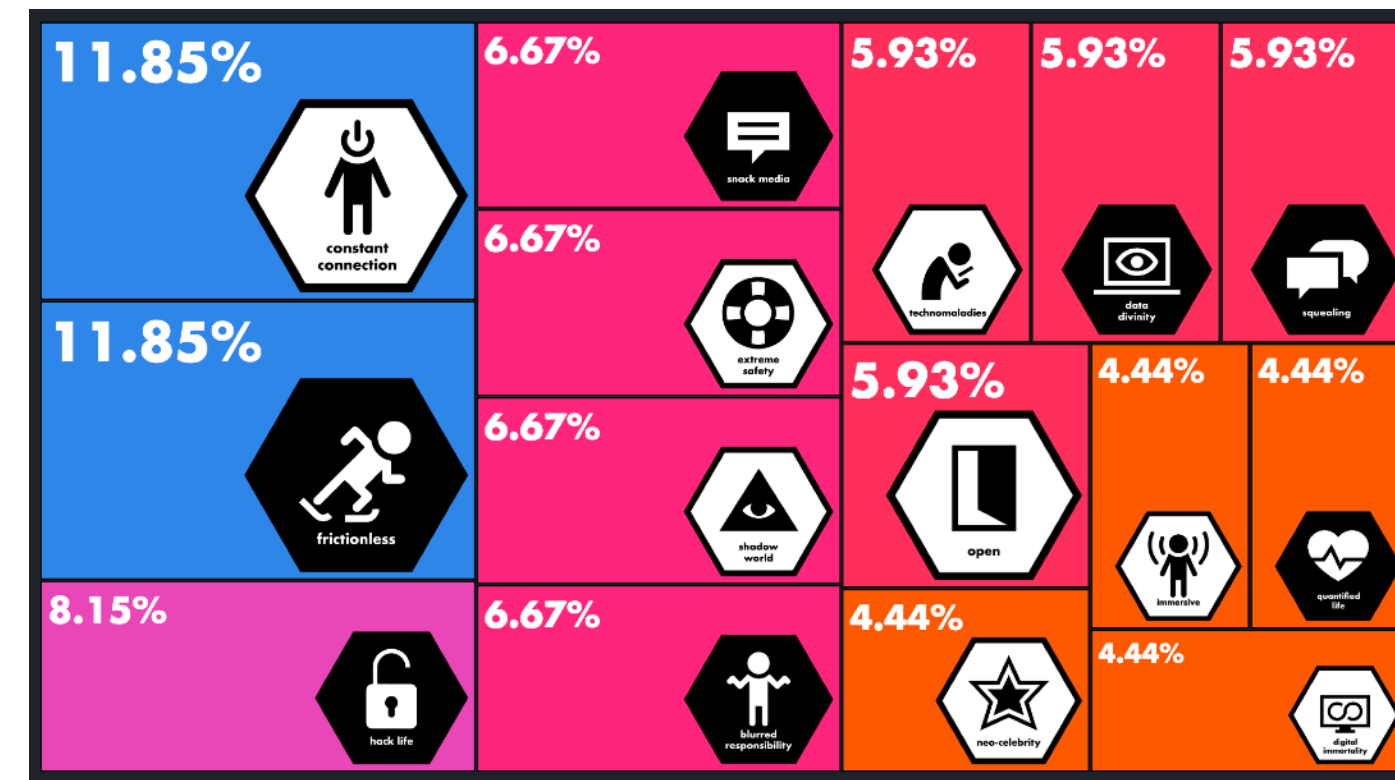


PROPRIETARY CONSUMER RESEARCH

BBDO is running an ongoing consumer research panel to track consumer sentiment during the Covid-19 outbreak.

The research is designed to track shifts in motivations and needs, and to unearth signals of readiness to maximize opportunities for business continuity.

Results will be released on a weekly basis.



REAL-TIME CONSUMER DATA

Using Omni real-time data we are able to track shift in cultural signals and consumer motivations and needs.

This helps us to better understand the contexts around current states, and direct appropriate brand action accordingly.

Data is monitored daily with formal updates weekly.



NEWS & REPORT DISTILLATION

With huge volumes of news and the publication of thought-pieces it can be difficult to separate the signal from the noise.

BBDO is consolidating all available reports and distilling insights to prioritize creating clear direction for brands.

A QUICK CAVEAT:

Timelines within the framework are based around current narratives from the WHO, the CDC and other appropriate sources.

They are highly likely to change.

The dashboard will be updated accordingly.

All other data that informs the framework and subsequent recommendations is sourced from real-time consumer and category data, powered by Omni, alongside other proprietary and third-party sources.

A FRAMEWORK BUILT AROUND THREE KEY PHASES

A data-informed framework that collates real-time insight to monitor, forecast and scenario plan effectively.

Designed to help brands quickly tap into the now state, identify overarching consumer motivations & needs, and calibrate their brand and marketing activities appropriately.

The framework dashboard will be updated and released on a weekly basis, with evolving perspectives and recommendations for brands to consider. It is built around a three-phase structure:

RAPID REAPPRAISAL

The immediate “crunch” mode, as the outbreak gains momentum and emergency measures such as shelter-in-place and extreme social distancing are put into action. A short, concentrated period of extreme short-term thinking that is dominated by motivations around safety, fear, connection, recalibration and a need for escapism.

ESTIMATED TIMEFRAME: NOW TO EARLY APRIL 2020

HOLDING PATTERN

The phase with most “known unknowns” as it is likely to be relatively elastic in duration. During this phase consumers are learning to accept and adapt to a new (albeit temporary) normal, and are establishing routines. Dominant motivations are likely to be around ongoing mental and physical wellness (and potential grief management),

ESTIMATED TIMEFRAME: EARLY APRIL TO EARLY/MID-JUNE 2020

A NEW NORMAL

As we begin to reduce levels of social distancing we can expect a phased return to prior behaviors to minimize potential for a second spike in cases. An economic contraction is expected but the scale and duration of any recession is currently unclear, along with any significant shifts in consumer spending and confidence. Dominant motivations are expected to be centered around a tension between desire for frugality and the joy of release.

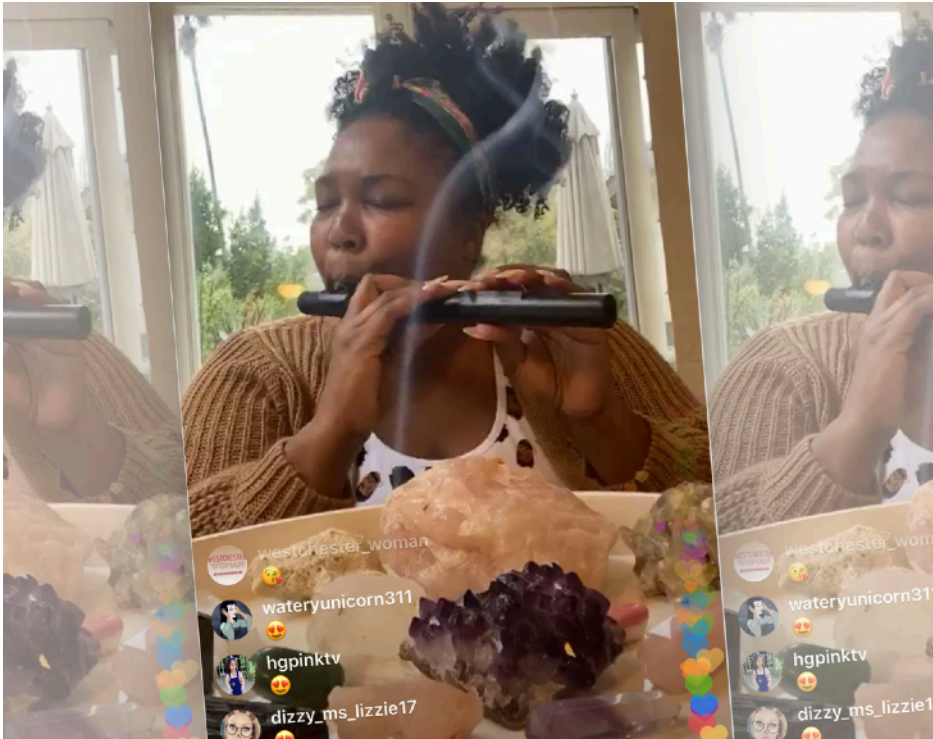
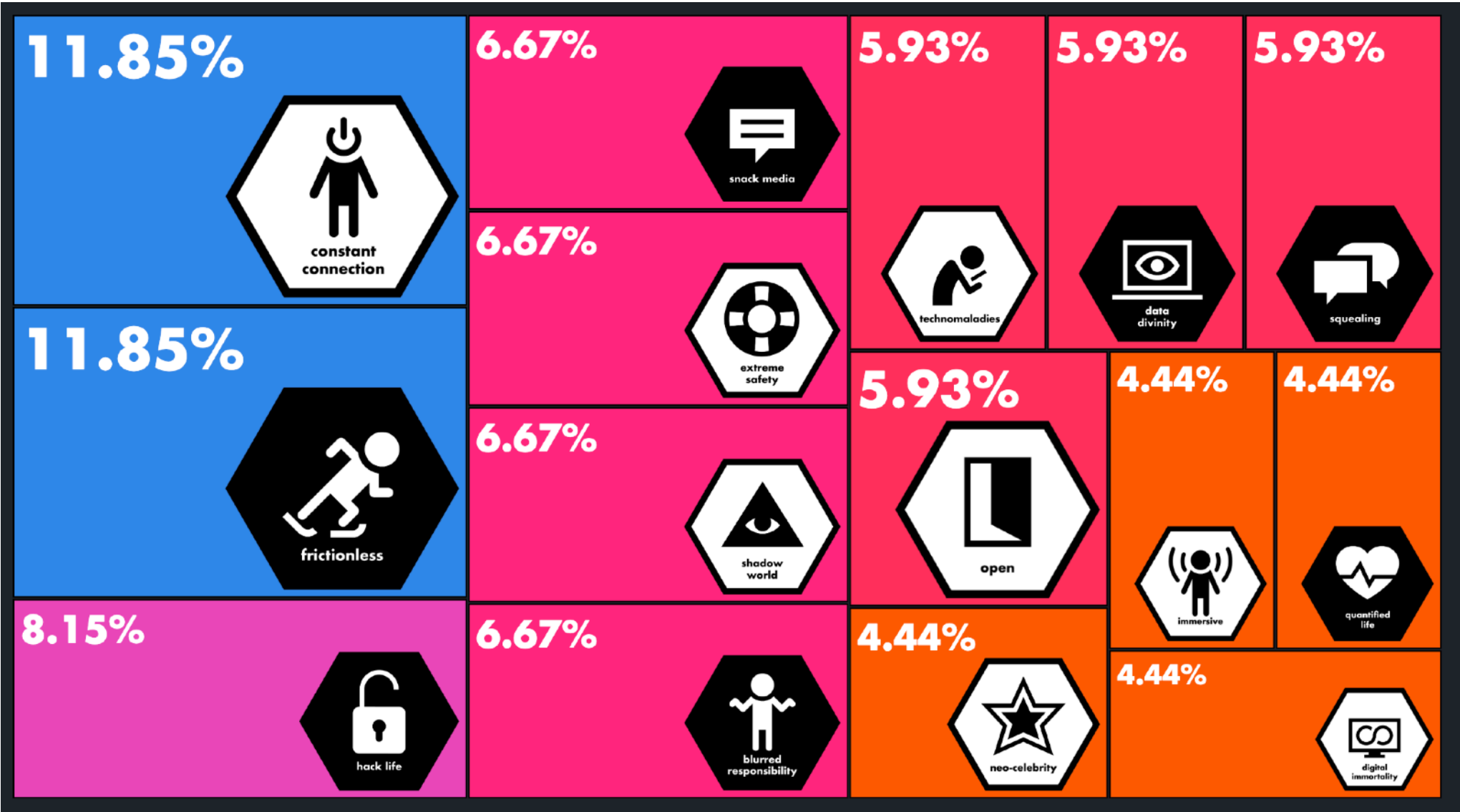
ESTIMATED TIMEFRAME: EARLY/MID-JUNE THROUGH Q3 2020

CONTEXTUALIZED WITH REAL-TIME CONSUMER AND CULTURAL SIGNALS

Utilizing real-time consumer data from Omni, proprietary BBDO omnibus research and additional third-party data.

Data is reviewed and consolidated daily to track shifts in consumer motivations, behaviors and attitudes in close to real time.

By tacking data on an ongoing basis, we are able to identify shifts as they happen, and to forecast potential future themes as contexts shift and realities readily evolve.



WHAT CURRENT DATA IS TELLING US

We have identified macro consumer signals that are in play in this moment, along with working hypotheses for signals we anticipate to see emerge.

MACRO SIGNALS WE CAN SEE NOW



Together
Apart



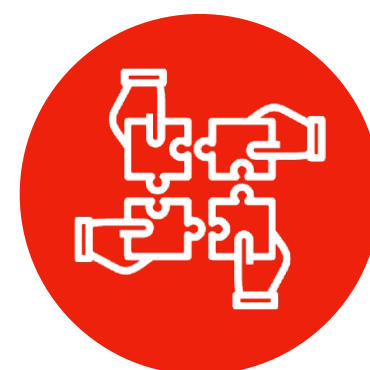
Sparks
of Joy



Mind
Matters



Hero
Hailing



Share
the Load



Hacking
Normality

MACRO SIGNALS WE ARE ANTICIPATING



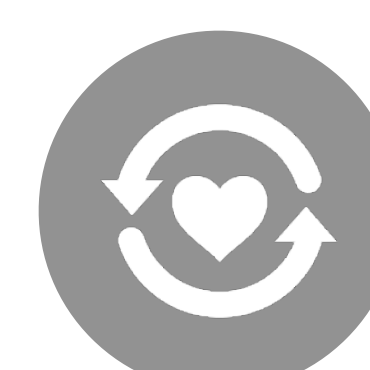
Beacons
of Hope



Practical
& Prepared



Classics
Revisited



Pay it
Back



Shared
Grief

These signals are current working hypotheses only and are expected to change as the outbreak continues. These will be updated on a weekly basis.

CURRENT CONSUMER THEMES



Together
Apart

Consumers actively seeking ways to establish and maintain human connection and interaction.

A hunger for sense of collective experiences while distanced – solidarity, support and socialization.



Hacking
Normality

In response to a rapidly evolving reality consumers have quickly utilized technology to find life hacks to create facsimiles of ordinary life.

Video conferencing, live streaming and the breaking of some professional/personal taboos are key.



Sparks
of Joy

During periods of prolonged anxiety consumers are seeking moments of joyful distraction.

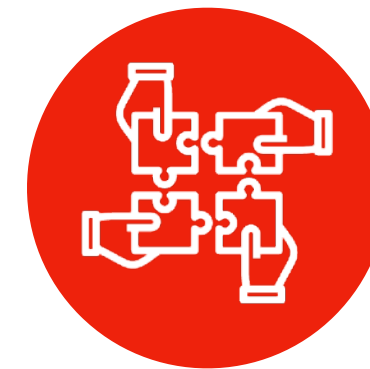
Resurgence of simple pleasures including cooking, crafting, music and dance, albeit all fueled by technology and social media.



Mind
Matters

Recent trends around self-care and wellness are being put into practice as an active monitoring of mental health.

Mindfulness, exercise and human connection are dominant signals,



Share
the Load

As early fall-out impacts specific industries, and immediate lay-offs occur, communities are rallying to share the burden and support those hit first.

Emphasis on local impact and supporting individual and/or smaller businesses,



Hero
Hailing

As the world practices social distancing at scale, the key workers who remain on the front line are hailed as heroes.

Consumers are eager to recognize and celebrate those on the front line, and are seeking ways to help and support.

RAPID REAPPRAISAL Estimated: Now to mid-April

Extreme safety • Short-term thinking • Fear • Connection • Escapism

HOLDING PATTERN Estimated: Mid-April - Jun

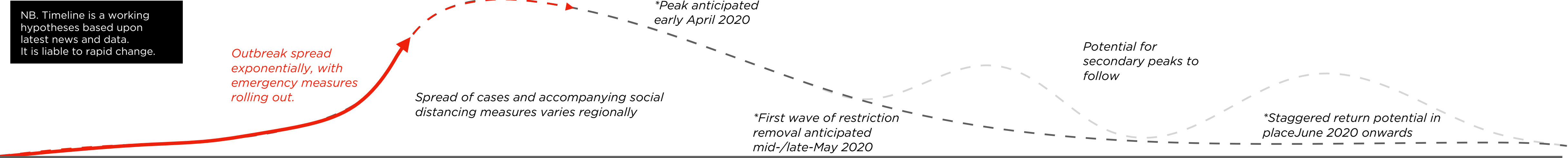
Short/medium-term thinking • Adaptation • Acceptance • Coping • Connection

NEW NORMALITY Estimated: June - end Q3

Medium/longer-term thinking • Budgeting • Anticipating • Exploring • Caution

CURRENT
ESTIMATED
TIMELINE

CONSUMER
CONTEXT



Hunger for information, constant news cycle, rumors and hoaxes. Panic buying and lay-offs.

Dramatic cuts in spending and no planning. Disparate states of social distancing as regions respond with varying cadence. A desire for certainty and hope.

New routines and habits get established as “urgent hacks” become new norms.






Decline in acute angst replaced with resignation to the current state and flaring apprehension about what comes next.

News events may trigger periodic swings back into phase 1. Some sports may begin to return, minus live audiences.

Case numbers begin to decline and there is a return to “business as usual”. Sports will begin again, restaurants and bars will reopen.

Phased loosening of social distancing measures is likely. Celebratory mood likely to be underpinned by economic caution and grief at loss of life.

CONSUMER
SIGNALS


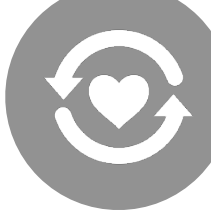
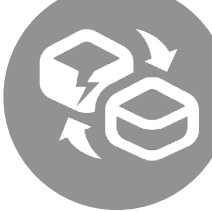





IMPLICATIONS



IMPLICATIONS

**Data-informed hypotheses. Subject to change*



IMPLICATIONS

**Data-informed hypotheses. Subject to change*

PRIORITY
ACTIONS

PAUSE	PRODUCE
PREPARE	PROTECT


PAUSE	PRODUCE
PREPARE	PROTECT

PAUSE	PRODUCE
PREPARE	PROTECT


PHASE ONE: RAPID REAPPRAISAL

Dominant mindsets: Extreme safety • Short-term thinking • Fear • Escapism • Connection **Estimated timeframe:** Now to early April 2020


CULTURAL SIGNALS & IMPLICATIONS




Together
Apart



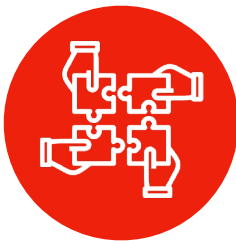
Sparks
of Joy




Mind
Matters



Hero
Hailing



Share
the Load



Hacking
Normality

PARAMETERS & WATCH-OUTS

- We need to be helpful in this moment: adding clarity, creating levity, offering utility.
- Any commercially-driven messages need to feel personal and highly contextual or risk being seen as opportunistic.
-

PROVOCATIONS & CONSIDERATIONS

- What is being done to protect brand equity and salience?
- Should we be active at all?
- What role are we playing?
- How can we leverage social to amplify our brand acts?
- What can we do now to

PAUSE

PRODUCE

PREPARE

PROTECT

NOTES

PHASE TWO: HOLDING PATTERN

Dominant mindsets: Short/medium-term thinking • Adaptation • Acceptance • Coping • Connection **Estimated timeframe:** Early April to early/mid-June 2020

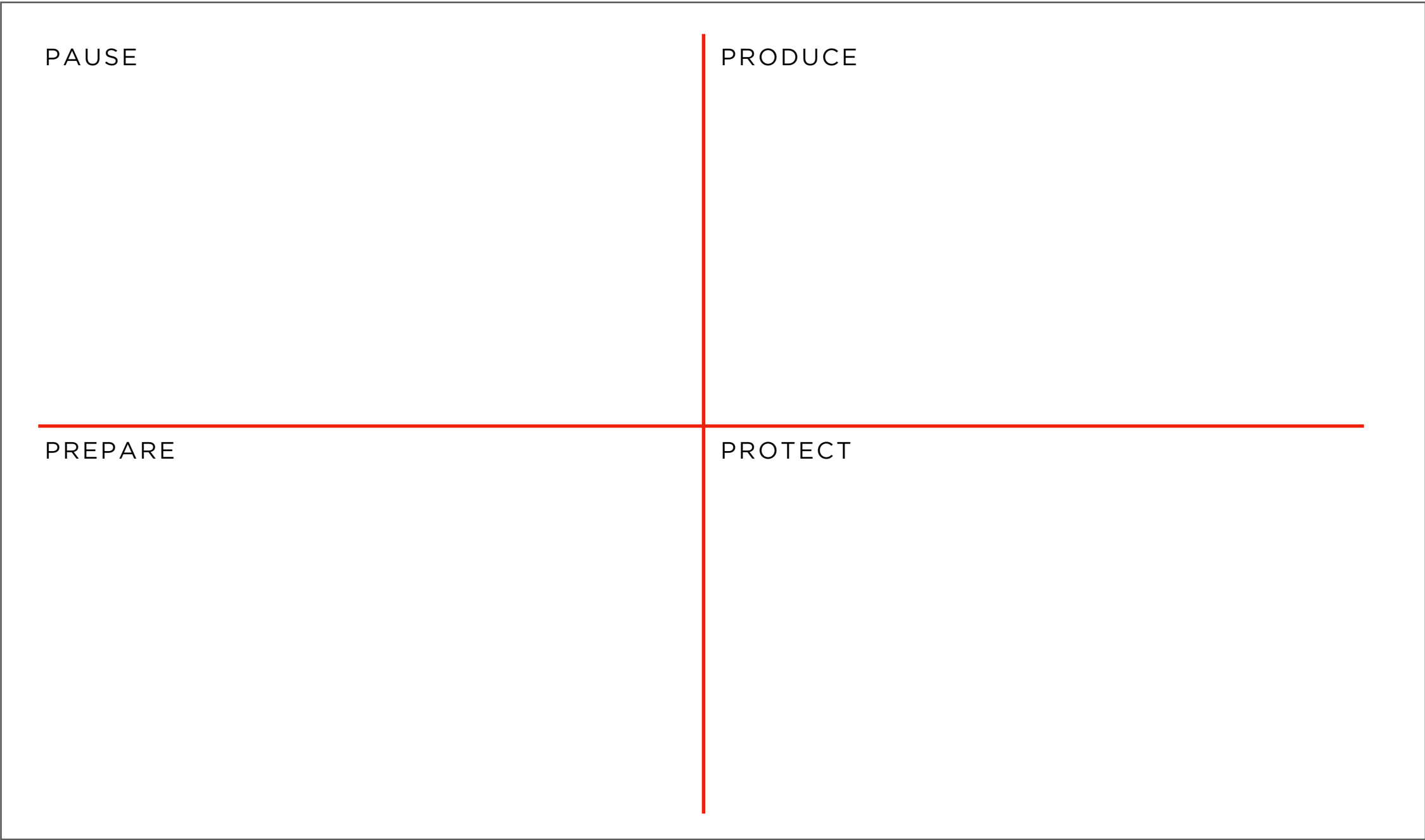
CULTURAL SIGNALS & IMPLICATIONS

PARAMETERS & WATCH-OUTS

- Be mindful of volatile shift in mood and appropriateness of tone
- Local matters -- not all regions are experiencing the outbreak at the same cadence.

PROVOCATIONS & CONSIDERATIONS

- How might we ensure local relevance and context?
- What is the most effective balance of mass and targeted communications?



NOTES AND WARGAMING

PHASE THREE: A NEW NORMAL

Dominant mindsets: Medium/longer-term thinking • Budgeting • Anticipating • Exploring • Caution **Estimated timeframe:** Early/mid-June through Q3 2020

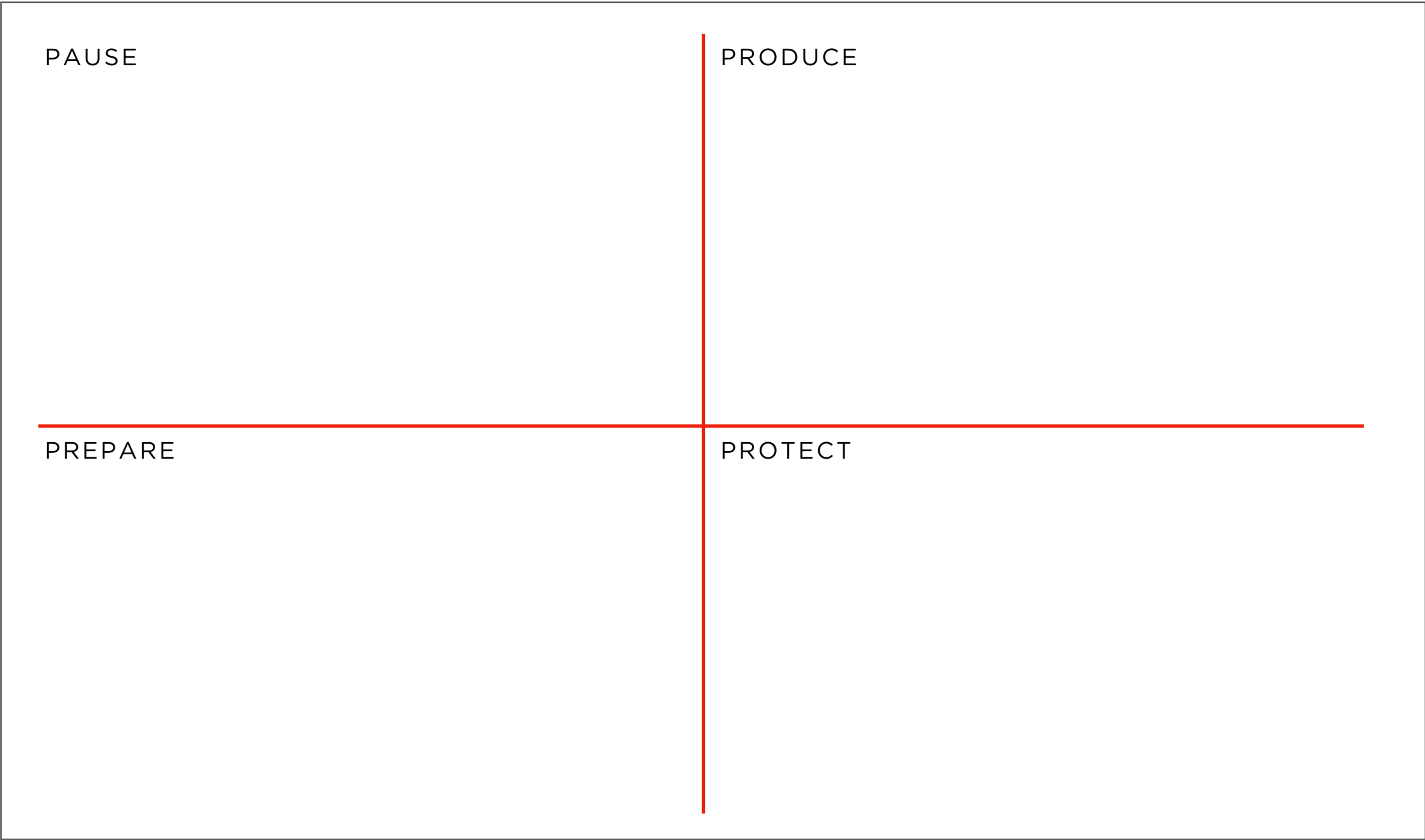
CULTURAL SIGNALS & IMPLICATIONS

PARAMETERS & WATCH-OUTS

- Should we celebrate or sympathize?
- What new rituals have an impact on how we would normally go-to-market?

PROVOCATIONS & CONSIDERATIONS

- How might we ensure local relevance and context?
- What is the most effective balance of mass and targeted communications?



NOTES AND WARGAMING

HOW THE FRAMEWORK CAN HELP

Corralling existing thinking

Reduce swirl

Identify themes that give context

Bring clarity to objectives

Guide clients with prioritization

Bring a sense of forecasting and forethought.

Inspire adaptation for your clients' needs.

WARGAMING

Planning for alternative scenarios for what happens after the peak.

ALTERNATIVE SCENARIOS TO WARGAME

PHASED RELEASE

As shelter-in-place/lockdown directives are removed, can we anticipate on a partial “release” and flow of people back into routine, such as caps of 50% workforce in work at any one time.

ELEMENTS OF CONSIDERATION

- Which consumer groups are likely to benefit/suffer the most?
- What are the prevailing moods going to be?
- How does this slow down any potential “bounce back”?
- What contingencies need to be in place?
-

MULTIPLE PEAKS

As cities and states return to “a new normal” what happens when further, albeit smaller, spikes of outbreak happen?

ELEMENTS OF CONSIDERATION

- What happens if restrictions are switched on and off throughout the remainder of 2020?
- What will this do to consumer mood, purchase intent, needs and motivations?
- Which categories will thrive/struggle/fail?
- What contingencies need to be in place?
- What are the implications for comms?

REGIONAL CONSTRAINTS

Outbreak, lockdown and a return to “a new normal” are not occurring simultaneously across states, counties or cities. What happens if access to or travel between regions remains limited?

ELEMENTS OF CONSIDERATION

- What happens if states are locked down while others are not?
- What does this mean for supply chain?
- What is the knock-on impact around the election?
- What contingencies need to be in place?
- What are the implications for comms?

OTHER THINGS OF NOTE

APPENDICES

WE KNOW THAT BRAND SALIENCE
AND CREATIVITY ARE POWERFUL TOOLS
TO USE NOW AND AS WE PROGRESS.

BRAND SALIENCE IS CRITICAL TO STRONG “BOUNCE BACK”

Brand strength is critical to ensuring a more rapid “bounce back” as we emerge from this moment of crisis and the accompanying economic contraction.

Strong brands recovered 9x faster^{[LINK](#)} after the 2008 recession.

Brand salience is critical to brand strength and ability to generate sales volume quickly as it delivers brand dominance in moment of choice to maximize purchase intent.

AWARENESS

A passive state acknowledging which brands are present within a category. Short-term impact as it can flare in specific moments in time. Not directly connected to potential consideration, interest or intention when triggered into purchase mode.

SALIENCE

Active state built from noticeability, memorability and comprehension that ensures brand becomes primary consideration when triggered into purchase mode. Creativity utilized to recruit and re-recruit at all points along a path-to-purchase using simultaneous top-down & bottom-up signaling.

CREATIVITY IS A POWERFUL ECONOMIC MULTIPLIER

Building brand salience requires powerful creativity to ensure brands are noticed, remembered and understood.

Creativity is proven to increase advertising effectiveness in both the short- and long-term.

4x

Campaigns that aim for fame work 4x harder than the average [\[LINK\]](#).

+150%

Disruptive creativity accelerates brand growth [\[LINK\]](#).

60:40

Sales activation requires brand activity to maximize effectiveness [\[LINK\]](#).

12x

After brand size, creativity is the greatest profit multiplier [\[LINK\]](#).