



Pandemics, Politics & Business

Closing the Distance on
The Future of Marketing

J. Walker Smith

Chief Knowledge Officer, Brand & Marketing

jwalker.smith@kantar.com



NO, SERIOUSLY (SELFIES AND MEMES GET SERIOUS) 40%

Memes and selfies are normally frivolous and funny but it seems that in times of crisis they morph into something different.

We see people sharing public health announcements and memes but less to make a joke and more to state how important it is to take the advice seriously. Selfies as well are moving into the more activist space with people sharing their values, concerns and questions with others.

Typical posts: Information, selfies, memes

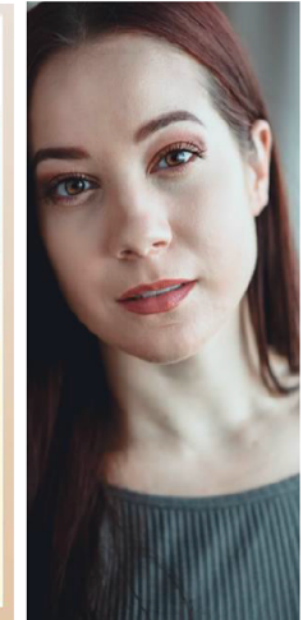
Hashtags: #iostoacasa, #coronavirus, #istayathome

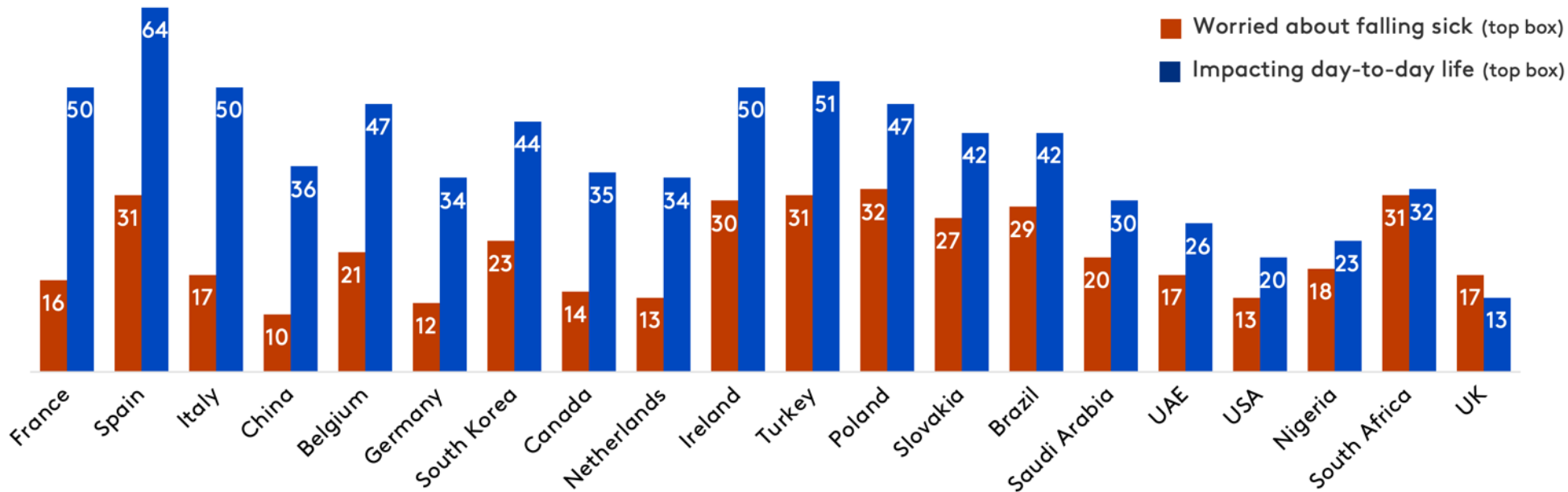


CORONAVIRUS: COSA FARE FINO AL 3 APRILE

- **Quale distanza devo tenere dalle altre persone?**
Distanza di 1 metro.
- **Se ho la febbre? Segno o tocca il mio corpo?**
Se hai la febbre, tocca il tuo corpo e non andare al pronto soccorso.
- **Posso andare in altri comandi?**
Assolutamente NO, salvo situazioni di necessità.
- **Posso muovermi per motivi sanitari?**
Sì, sempre.
- **Posso spostarmi per lavoro? Anche in un altro comune?**
Sì, gli spostamenti per motivi lavorativi sono consentiti. Megli spostamenti per lavoro, in zona protetta, senza fare commutazioni, il bene avere con sé l'autocertificazione.
- **Se mi ferisce dalle zone rosse/verdi, posso rientrare?**
Se sono consentito i rientri propri al domicilio.
- **Chi deve assolutamente stare in casa?**
Persone che sono sintomatiche o con patologie.
- **Messe e altre funzioni religiose si svolgono?**
No.
- **Bari, gelaterie, ristoranti possono rimanere aperti?**
Sì, dal lunedì al venerdì 18:00 nel rispetto della distanza di sicurezza fra i clienti.
- **Medici e grandi supermercati di vendita? Chiusi nei giorni festivi e prefestivi, hanno gli alimentari?**
Sì.
- **Farmacie e parafarmacie? Aperte normalmente?**
Sì.
- **Asili, scuole, Università? Chiusi fino al 3 aprile?**
Sì.
- **Fuori in, convegni, eventi, manifestazioni? Vietati?**
Sì.
- **Prati, cinema, palestre, piscine, discoteche, musei, biblioteche? Chiusi?**
Sì.
- **Offici comunitari? Dove tutti i servizi sono fruibili online.**
Sì, dove possibile, i servizi sono fruibili online.
- **Posso fare la spesa? Sì, una persona per famiglia.**
Sì.
- **Posso andare a mangiare dai parenti?**
Non è assolutamente necessario. La grandezza del rischio di stare lì più possibile nella propria abitazione per evitare che il contagio si diffonda.
- **Posso uscire a fare una passeggiata con i bambini?**
Sì, in spazi dove non ci sono persone che non fanno parte della famiglia. Non è vietato uscire, ma occorre evitare la presenza di assembramenti con familiari o con non di persone che vivono nella stessa abitazione.
- **Posso andare ad assistere i miei cari anziani non autosufficienti?**
Questa è una condizione di necessità. Rispondi però che gli anziani sono le persone più a rischio, quindi cercate di proteggerle e di curarle il più possibile.
- **Posso andare a fare la spesa in paese?**
Sì, è possibile, ma i commercianti sono tenuti a stabilire un numero massimo di persone che possono frequentare il negozio, mantenendo la distanza di un metro gli uni dagli altri. In ogni caso i supermercati e i centri commerciali restano chiusi. Il sabato e la domenica.
- **I comitati comunitari possono crearsi?**
Sì, dove possibile.

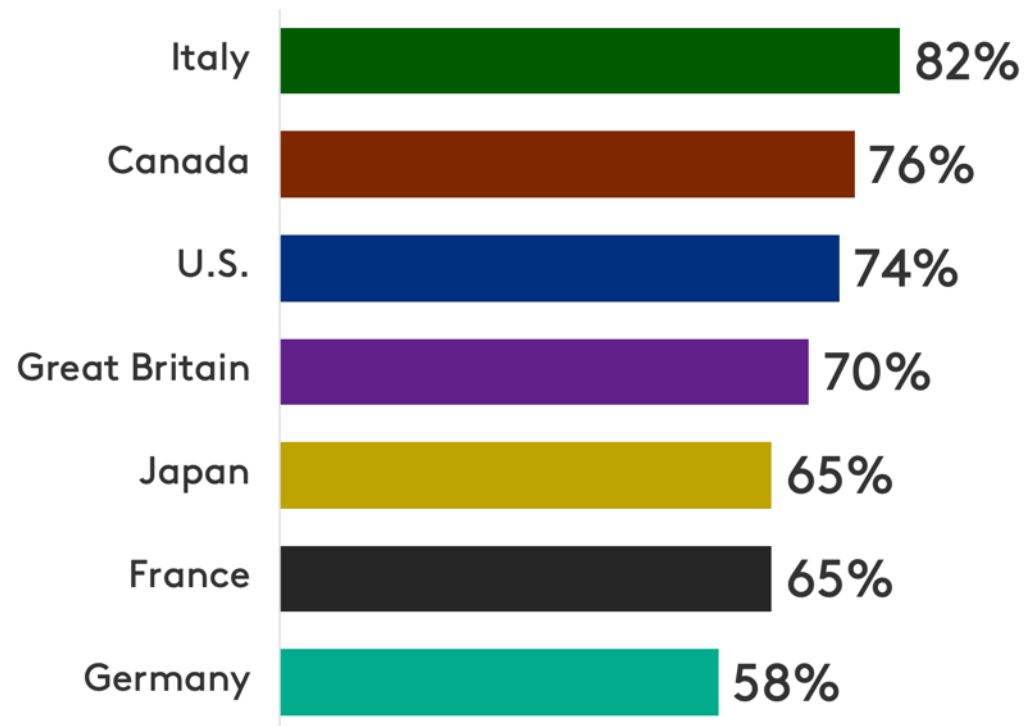
**VOGLIAMOCI BENE
#IORESTOACASA**





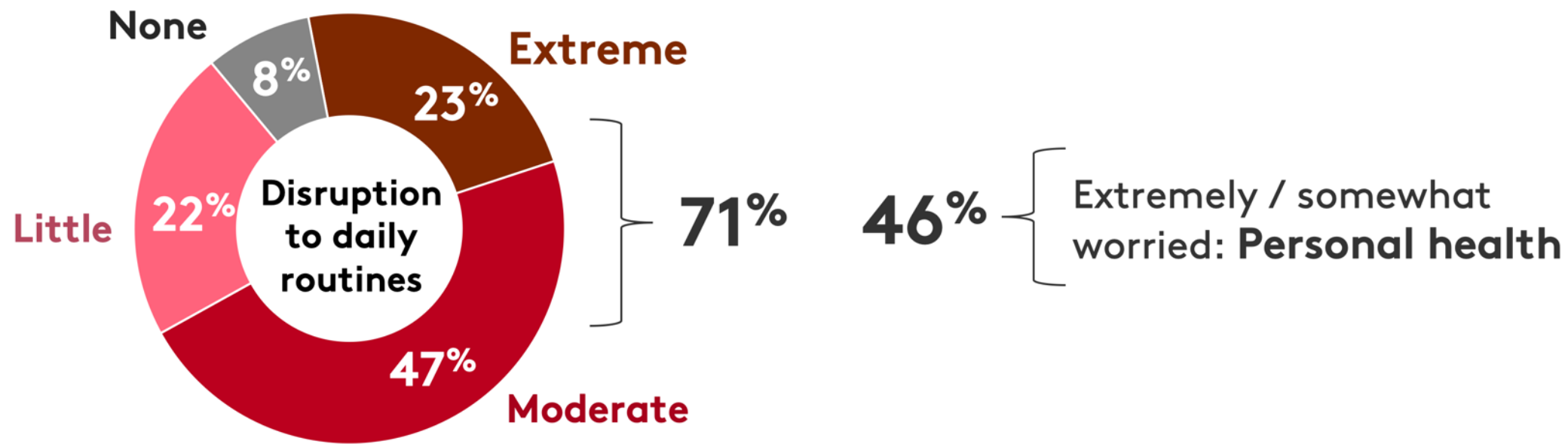
Kantar COVID-19 Barometer
Wave 1, 20 markets, March 14-19

Arrayed left to right by gap worry
falling sick vs. day-to-day impact



Coronavirus has or will
impact household income

Kantar G7 COVID Tracking Poll
March 19-21, 2020



Kantar U.S. MONITOR: COVID-19 Survey
March 17-20 (18+)

Focus on the correct “D”

Disruption

Disease

- Terrorism
- Downturns
- Pandemics

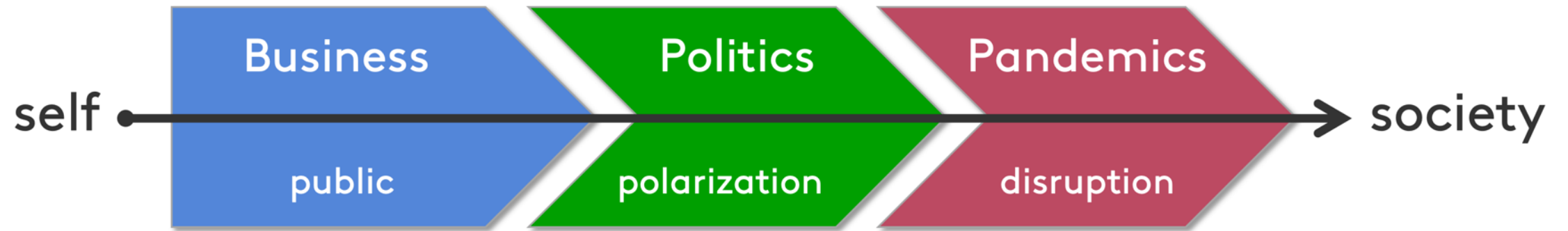


Disruption

- Terrorism
- Downturns
- Pandemics



Clear
the way





weave

the social fabric project



THE ASPEN INSTITUTE

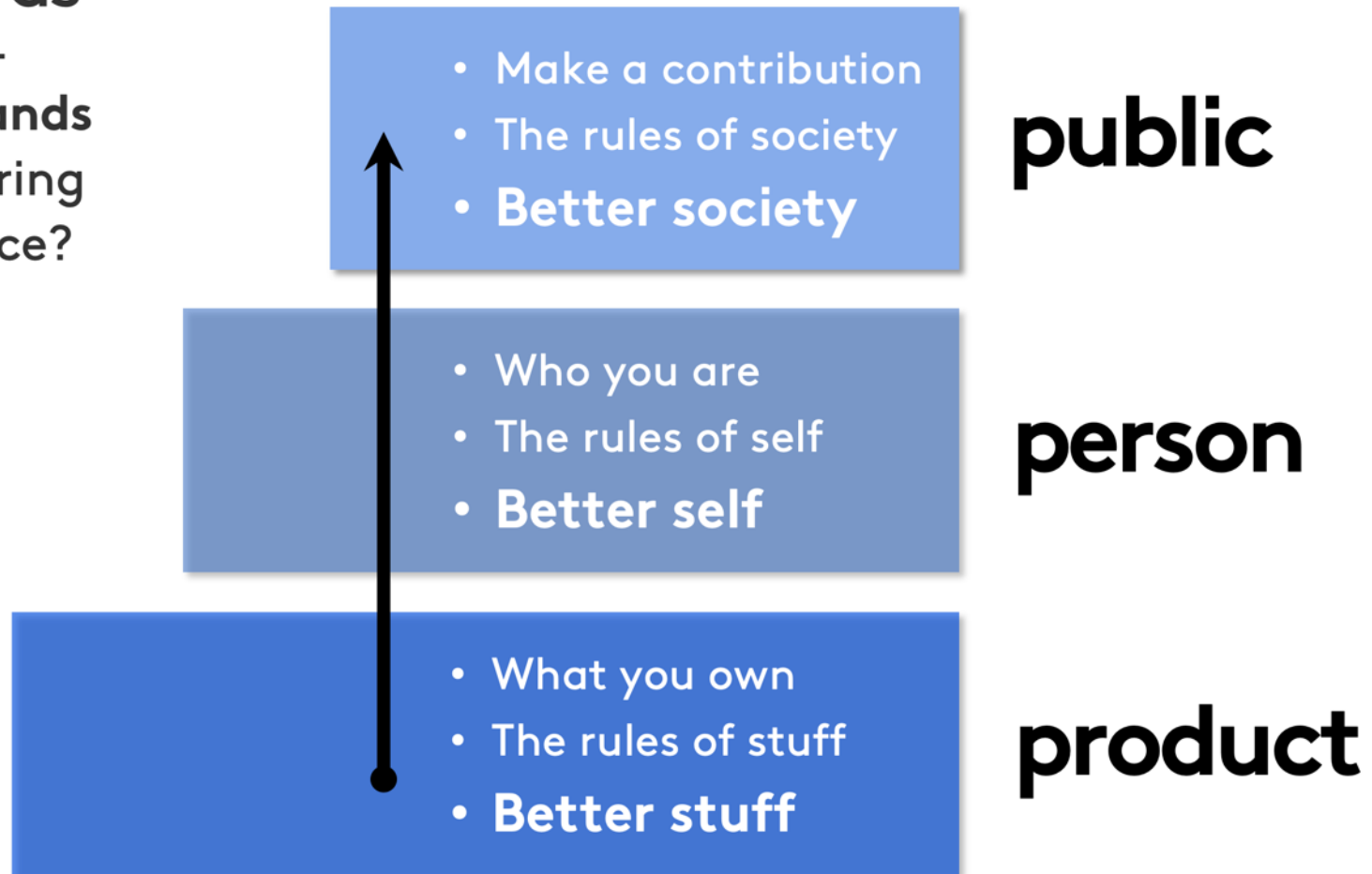


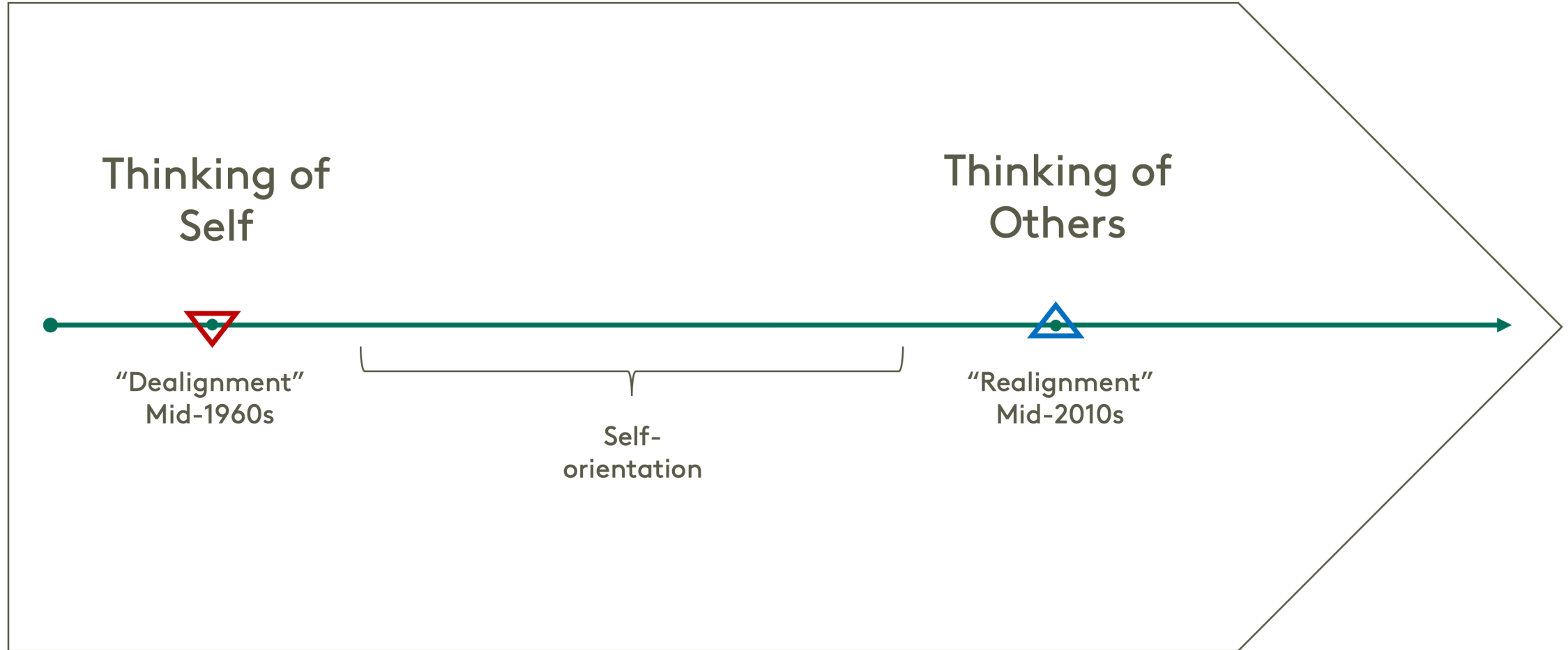
TIME
2019
PERSON OF THE YEAR

GRETA
THUNBERG

marketing eras

What is it that **brands** are expected to bring to the marketplace?

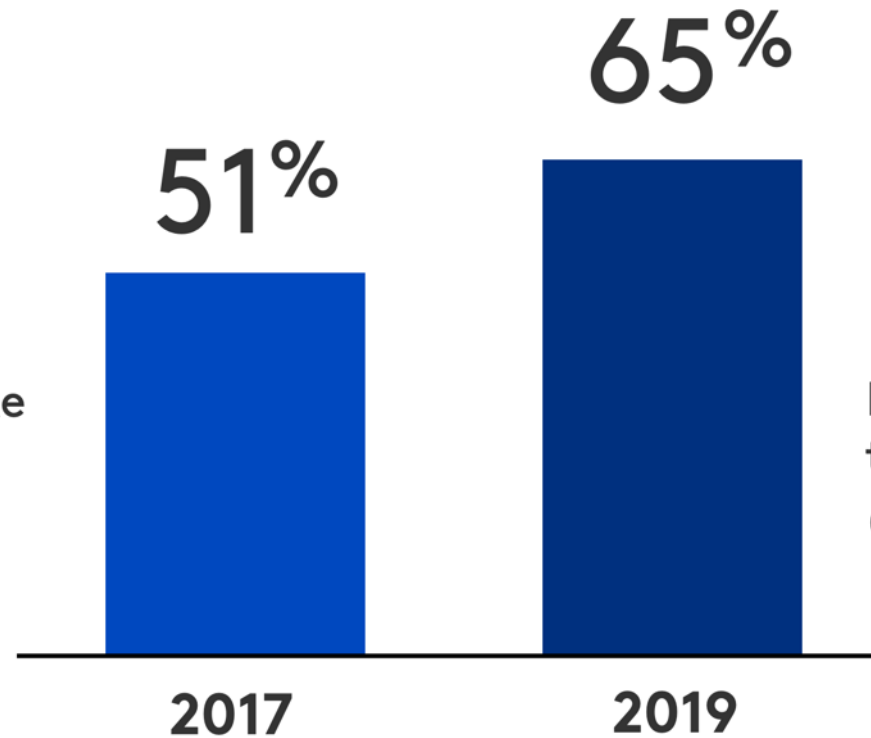




this is about a
brand ethic

not necessarily a
personal ethic

Brands expected to take
a larger role in society
(Edelman Trust Survey)



Important brands committed
to making society better
(Kantar Global MONITOR)

8-country average for US, UK, Brazil,
China, France, Germany, Italy, Japan.
2018 and 2019 were 64%.

https://www.edelman.com/sites/g/files/aatuss191/files/2019-07/2019_edelman_trust_barometer_special_report_in_brands_we_trust.pdf

8-country average for US, UK, Brazil,
China, France, Germany, Italy, Japan.
Full 26-country average was 66%.

The Conference Board, Feb. 12, 2020

EXECUTIVE SUMMARY: Consumers' Attitudes about Sustainability

Global survey of more than 30,000 consumers in 64 markets.

At a global level, consumers believe governments—ahead of tech companies and other policy and business organizations—should care the most about sustainability, but governments aren't living up to those expectations. Consumers therefore look more to companies to fill the void, which is an opportunity for brands to innovate, differentiate themselves, and delight consumers with initiatives around sustainability, thus fostering emotional attachment, willingness to pay, and word-of-mouth promotion to ultimately create financial value.

<https://conference-board.org/topics/consumers-attitudes-sustainability>



Making sustainability our standard

Sustainability, and climate change in particular, are poised to transform investing.



“Investors are **increasingly** ... recognizing that climate risk is investment risk ... [C]apital markets pull future risk forward, [so]we will see changes in capital allocation **more quickly** than we see changes to the climate itself ... [S]ooner than most anticipate, there will be a significant **reallocation** of capital.”



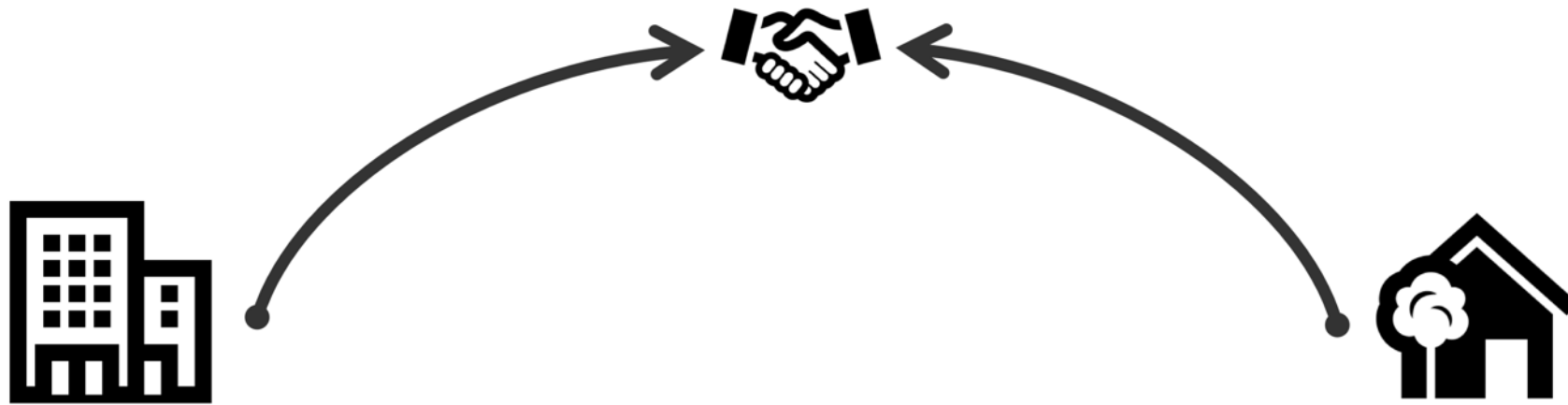
“Believe”

“Sacrificing”

take a stand,
but take no side



bridge the gap



health



Hygiene

local



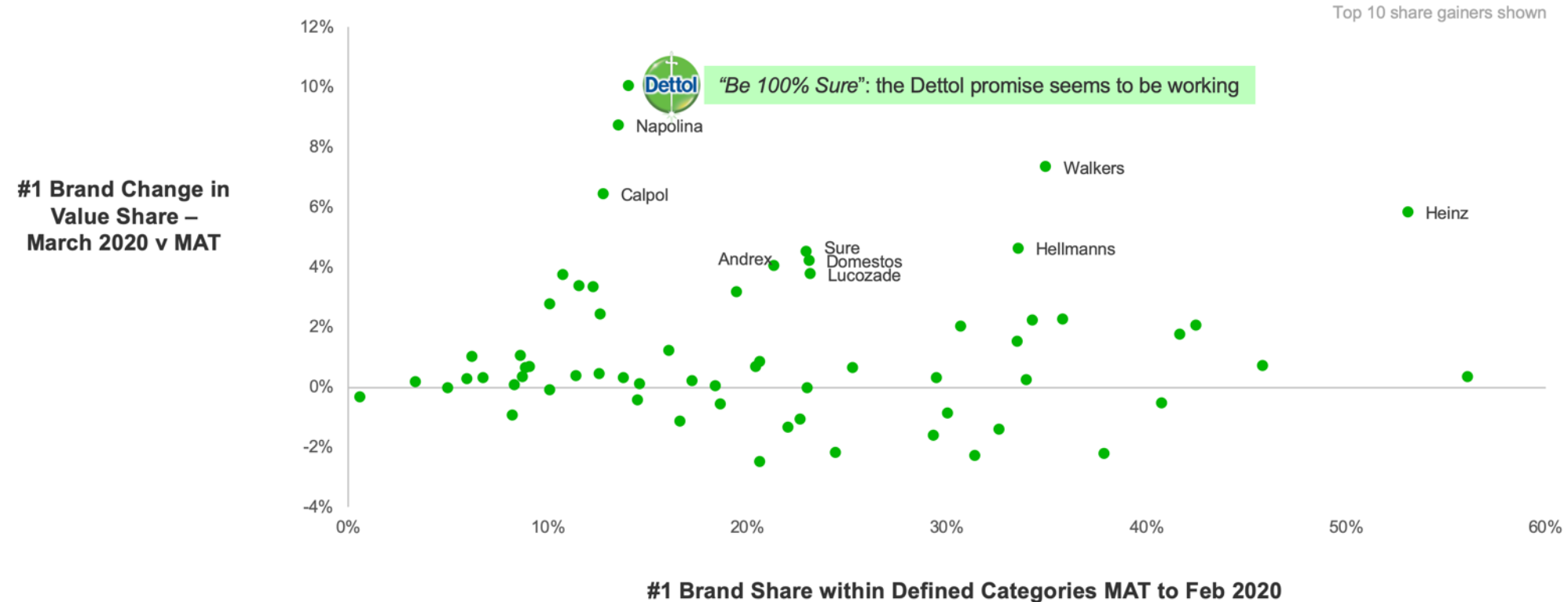
Self-sufficiency

trust less,
demand more



We expect the market leaders to be more successful during the lockdown

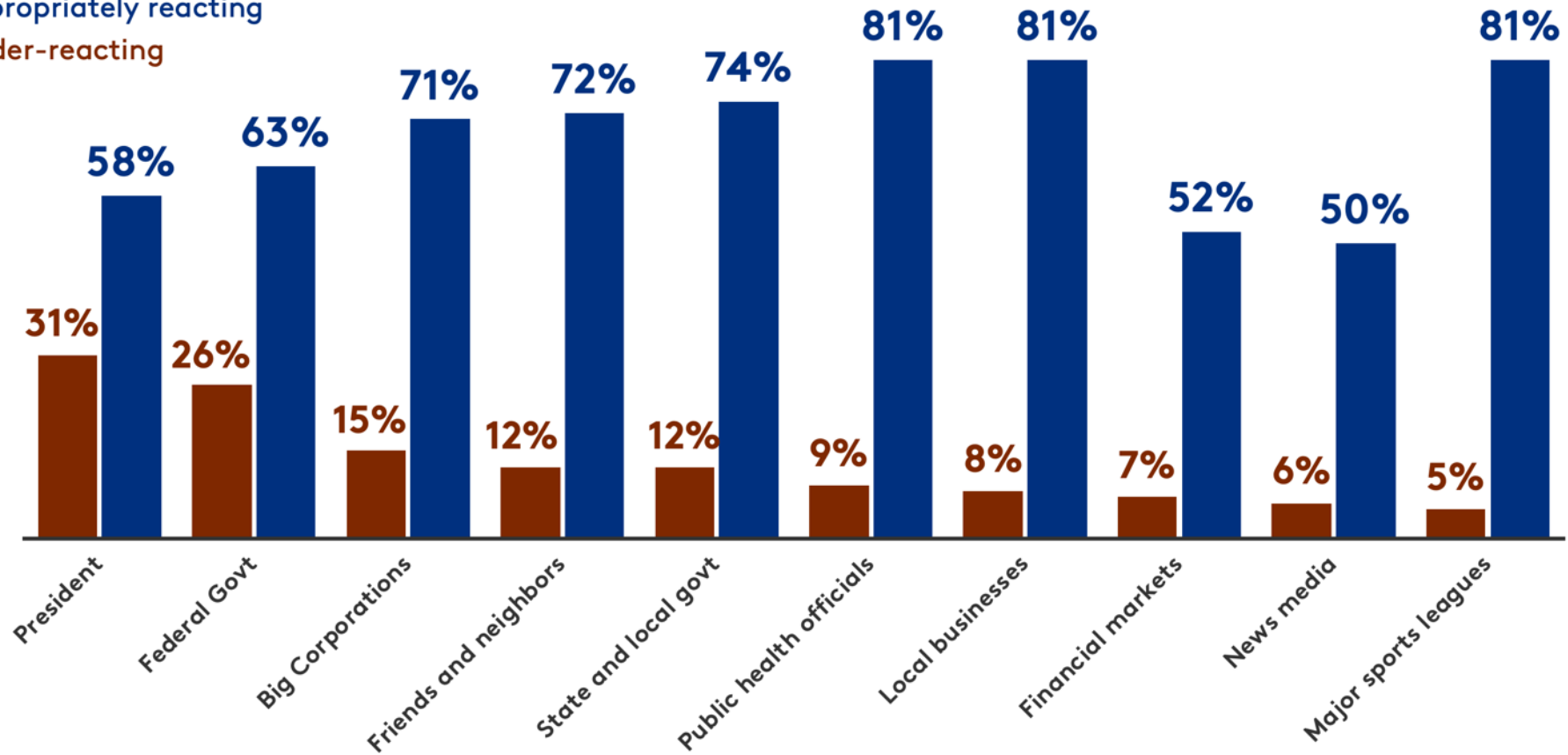
71% of #1 brands gained share during March 2020



Kantar FMCG Panel UK, 4we 22nd March 2020

Response to coronavirus

■ Appropriately reacting
■ Under-reacting



Kantar U.S. MONITOR: COVID-19 Survey
March 17-20 (18+)

What consumers expect of brands:

- 78% Look after employees
- 62% Implement flexible working
- 48% Support hospitals
- 35% Be helpful to government
- 8% Stop advertising

Kantar COVID-19 Barometer, March 14-19
30 markets, 25,000+ respondents

What consumers expect of advertising:

77% Talk about how brand is helpful in new everyday life

75% Inform about brand's efforts to face the situation

70% Offer a reassuring tone

75% Should not exploit coronavirus situation to promote the brand

40% Should avoid humorous tones

Kantar COVID-19 Barometer, March 14-19

30 markets, 25,000+ respondents

Among 92% who disagree stop advertising

Social Good

Brands will be held accountable to show a **positive social example** of sacrifice.
The hope for a better personal ethic is not assured by this shared experience.

App for gamers to share processing
power with virus researchers.



Donating food/making contributions
for hunger relief and food banks.



Started relief fund for small businesses.



Donating funds to 4 hospitals in Italy. GIORGIO ARMANI

Donating face masks.



We are, indeed,
learning a lesson about
our interconnectedness.

But it may well be less
about how I affect
you and more about
how you affect me.

So it's up to brands
to set the example.



Social Goods

In the immediate term, look for opportunities to **fill in gaps** of critical supplies.
Over longer term, assess whether these critical items are now **new necessities**.

Converting production lines
to make hand sanitizer.

COTY

LVMH L'ORÉAL



Retrofitting jets to transport medical
supplies and ecommerce packages.

Repurposing manufacturing
plants to make face masks
and hospital gowns.

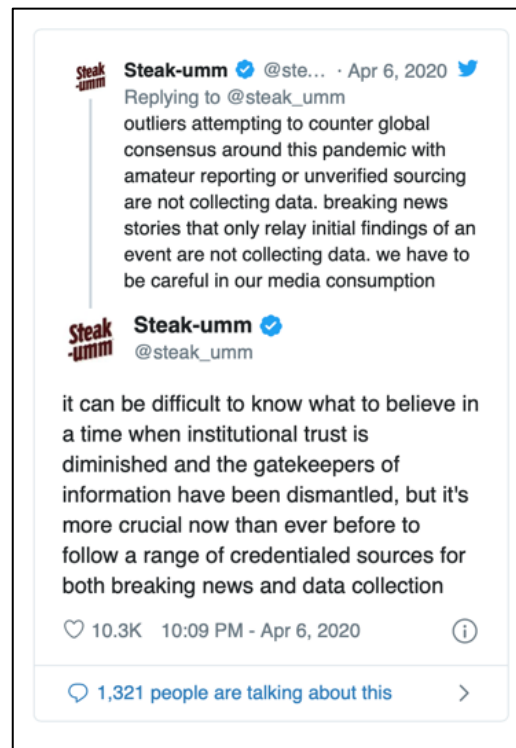
HANES*brands*

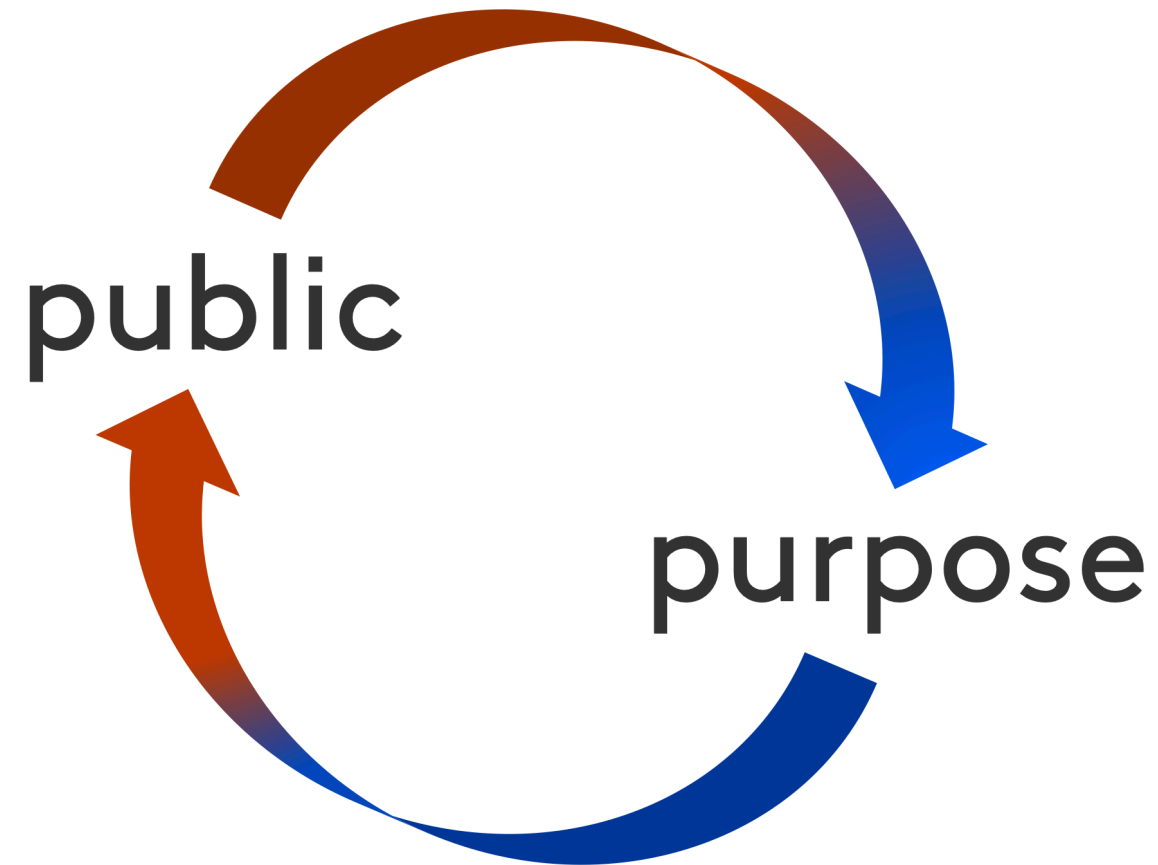
ZARA

BALENCIAGA



Using hotel rooms and other
available space for hospital beds.





KANTAR

Thanks!

Pandemics, Politics & Business

Closing the Distance on
The Future of Marketing

J. Walker Smith

Chief Knowledge Officer, Brand & Marketing

jwalker.smith@kantar.com



KANTAR