



KANTAR

COVID-19 LANDSCAPE

Deploying Kantar's AI toolkit to
help brands navigate unknowns

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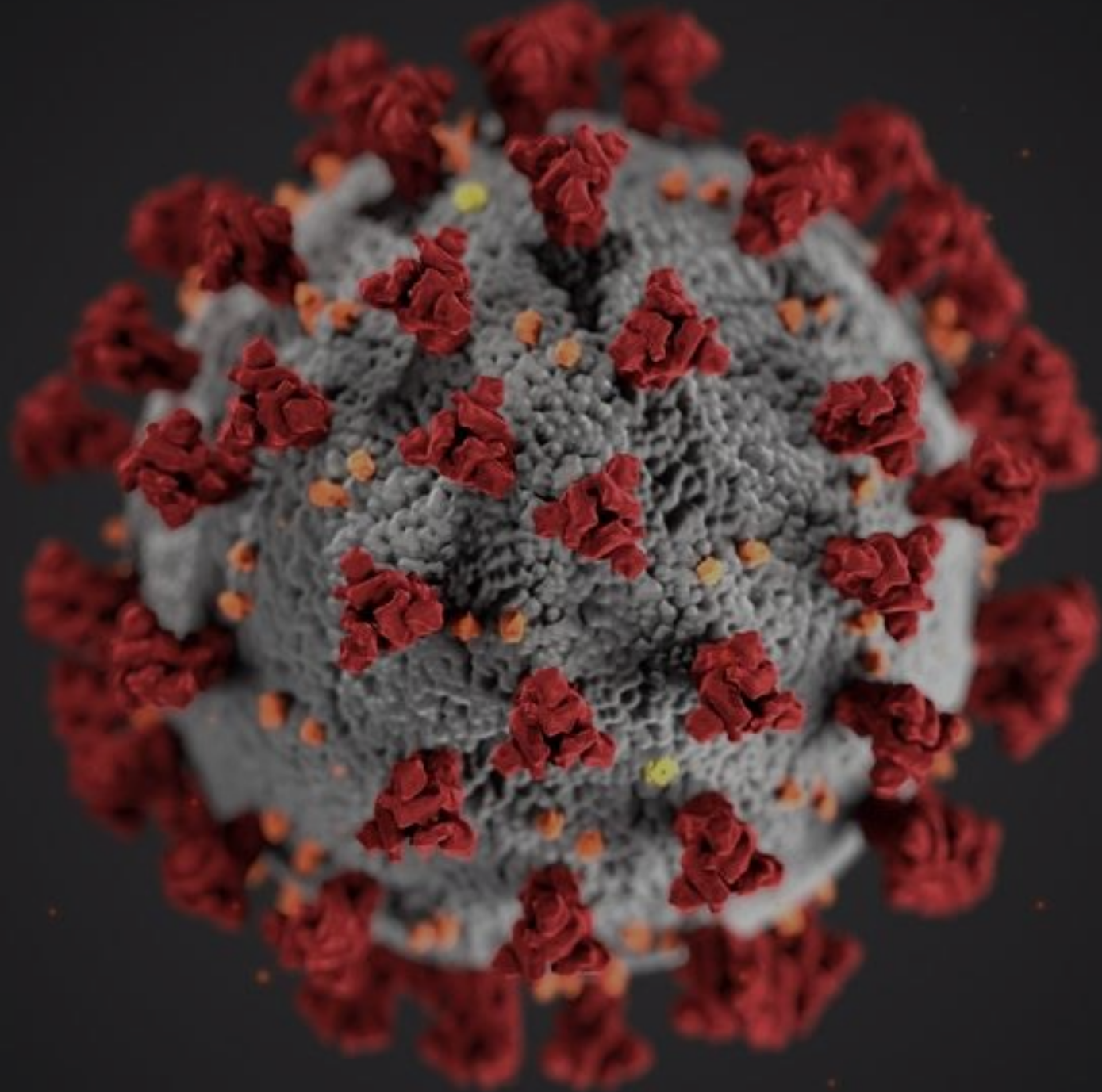
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1 Context



Context and Objective

Understanding a new reality

Covid-19 is spreading across the world at lightning speed, disrupting categories, businesses, and daily life with **unprecedented impact**.

A globalised world that is built on the need for human interactions is facing a **new reality**. Social distancing instead of social interaction. Working from home instead of working in an office. Reminiscing about past vacations instead of planning the next one.

Every day we see reports of thousands of new confirmed virus infections, updated and more rigorous measures implemented by governments to stop the spread, and an entire generation **facing uncertainty in all areas of life**.

It will take some time to adjust to this unknown new reality and people are sharing their emotions, challenges, crisis behaviors, and concerns in light of it on online platforms – offering a rich glimpse into their personal life and mind.

The objective of this landscape is to **gain insight into the way consumers talk online** about their concerns, needs and emotions, crisis behaviors as well as the locations and markets impacted the most in their perception. This will help your brand navigate uncertain times by understanding how people talk about the virus and the context surrounding it.



2

Universe and methodology





CONSUMER GENERATED CORONAVIRUS CONVERSATION

Our universe

Query based on: Coronavirus

Language: English

Timeframe: Last 6 months

Size of the universe: 89M+ ; *sampled down to 378K (post-cleaning)*

Lenses: 8

Sub-lenses: 575

Geo-fence: US, UK, Canada, Australia, India, Italy, France, Spain, Germany, Austria, Switzerland, Denmark

(In non-English markets, only local English-language mentions were collected)

Our lenses

We built a total of 575 sub-lenses to structure the data

Concerns

For example:

- Death
- Symptoms
- Infection
- Financial outlook

Category

For example:

- Travel & Mobility
- Hospitality
- Financial Services
- Personal Care

Crisis Behaviour

For example:

- Wash hands more
- Wear face mask
- Avoid crowds
- Cancel travel

Public Opinion

For example:

- Government Actions
- Employer Actions
- Politicians
- Institutions

Emotions & Needs

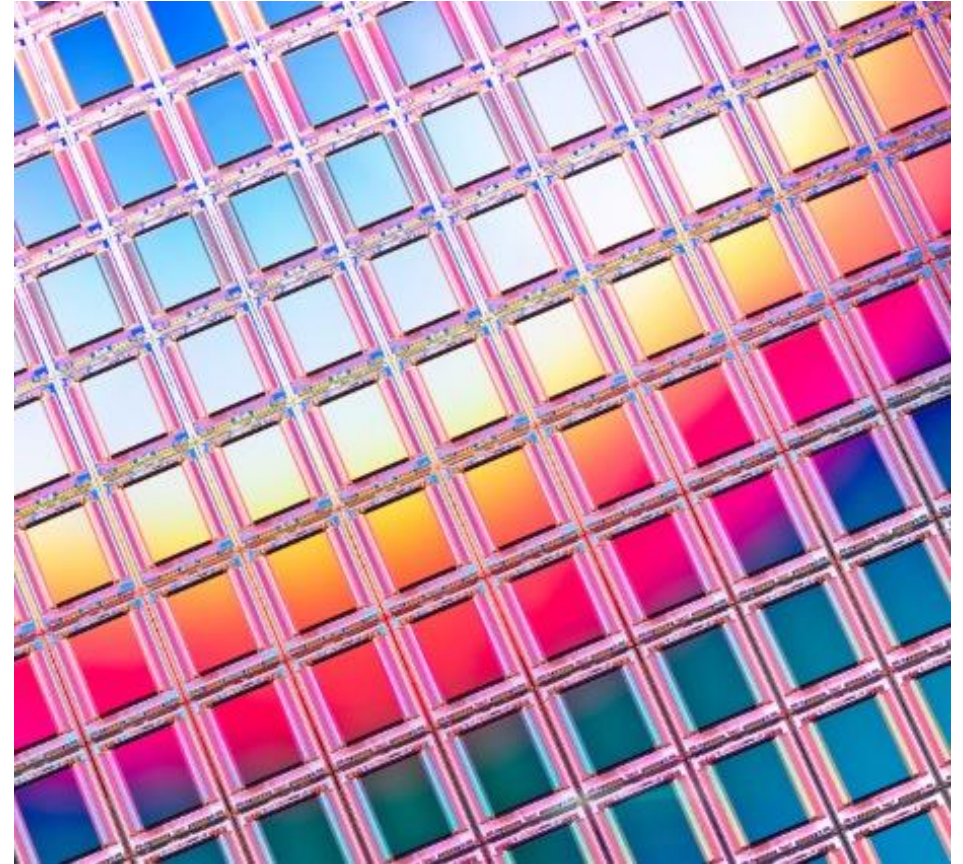
For example:

- Panic
- At ease
- Worried
- Safety

Country

For example:

- US
- UK
- Italy
- China



Methodology

STAN approach for a Category Landscape



1. Create a Universe

Select and gather relevant direct and adjacent categories' conversations from consumer generated content.



2. Structure the Universe

Combine human and machine power (NLP & co-occurrence) to create a bespoke codeframe in order to structure consumer conversations.



3. Analyse

Uncover new unknowns and trends by running advanced statistics analysis on the data (from correspondence to regression).



4. Deep dive

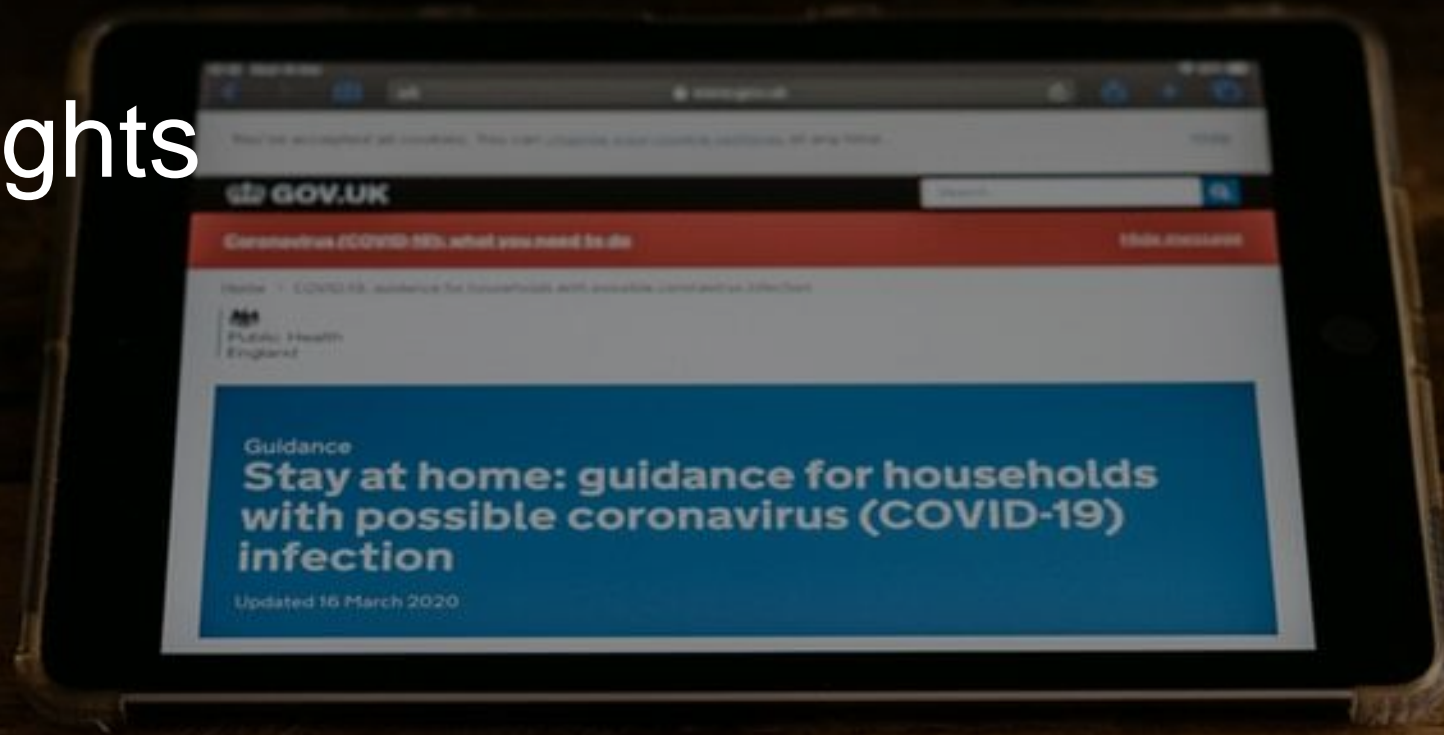
Delve deeper into specific opportunity areas and bring insights to life through consumer verbatims.



5. Delivery

Visualize consumer conversation at scale (PBI), discuss opportunity spaces through workshops, share meaningful insights (PPT).

3 Key Insights



Key Insights

5 findings to help your brand navigate the unknown

Top-ranked topics within markets reflect stage of virus

The co-occurrences associated with mentions of specific markets mirrors the stage of the pandemic in that market.

WFH in US, travel bans across Europe, early stage signals in France, and aftermath in China.

Disparity between our needs and emotional state

We discuss actions we can take or products we can use to move to safety. The number one action discussed is to avoid crowds. Other ways to safety that are being discussed online are the development of a potential vaccine, as well as other product related solutions such as increased use of hand sanitizer.

Associations with 'feeling panicked' unveil virus symptoms and death as drivers of panic. We also experience panic induced by financial turmoil and outlook, as well as fear about future insurance coverage for potential treatments.

Crisis behaviours show new daily reality and focus on future remedy

When discussing crisis behaviours, we are future oriented and discuss the lack of the remedy/vaccine and the need for development, while simultaneously sharing our present reality – working from home and avoiding crowds.

The two locations mention the most are 'at home' or 'at work' and both are associated with 'working remote' the most, emphasising the impact it has on our new daily life.

The impact on travel and mobility is top of mind for consumers

We are mainly discussing travel and mobility considering the virus outbreak, followed by personal care as a second mainstream category.

Third-ranked sport points to the global cancellation of events, while financial services hints at worries about the future.

Planes and cruise lines are top of mind for us, while insurances are discussed in light of future coverage of treatments.

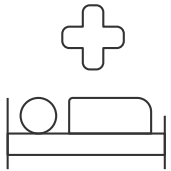
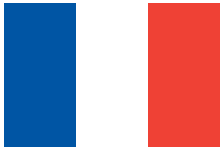
Government and employer actions discussed by the Public

Actions involving shutdowns and lockdowns rise to the top of online conversation.

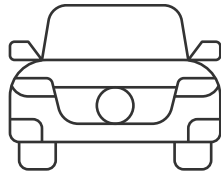
Feelings of worry and fear are mixed with the desire for the government's actions to provide safety and protection.

Co-occurrences associated with countries mirror its stage of the pandemic

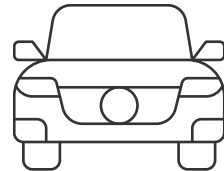
Early stage signals in France, travel bans across Europe, WFH in US, aftermath in China.



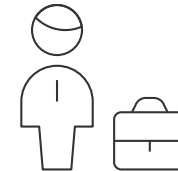
Symptoms



Travel and
Mobility



Travel and
Mobility



At Work

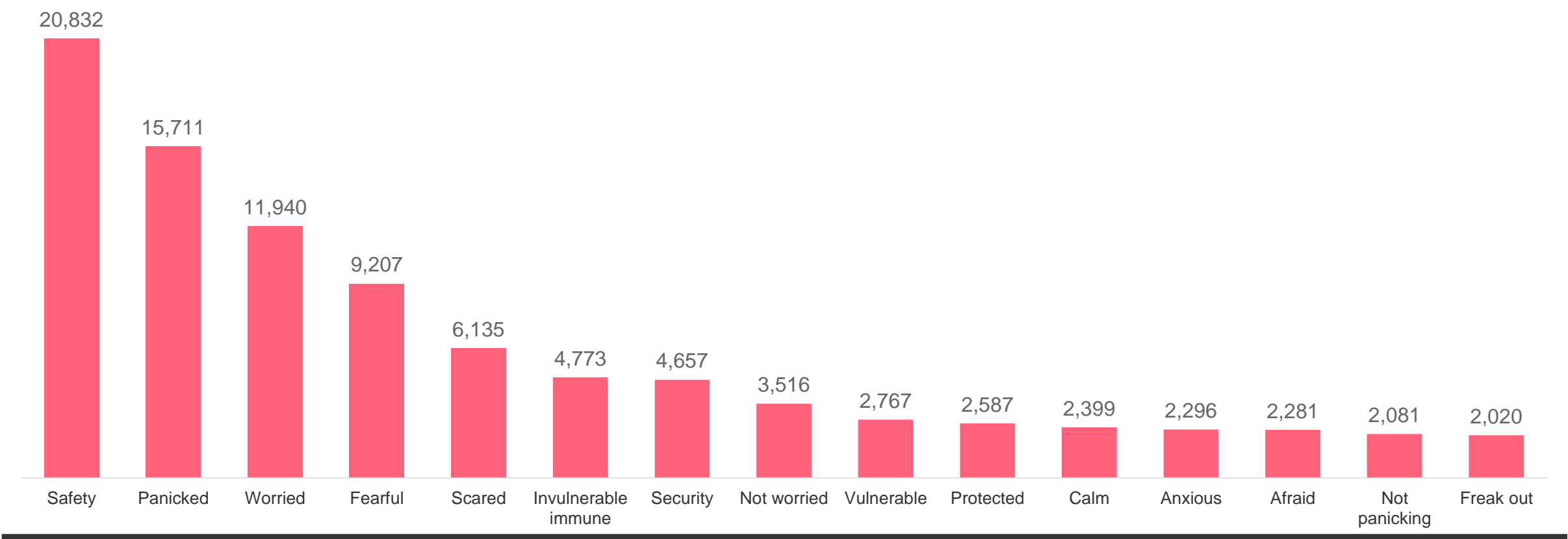


Death

Disparity between our need for safety and our emotional state

We want to experience safety and security, however, the emotional terms we use online reflect the opposite of that – panic, worry, and fear.

Volume of Emotions and Needs



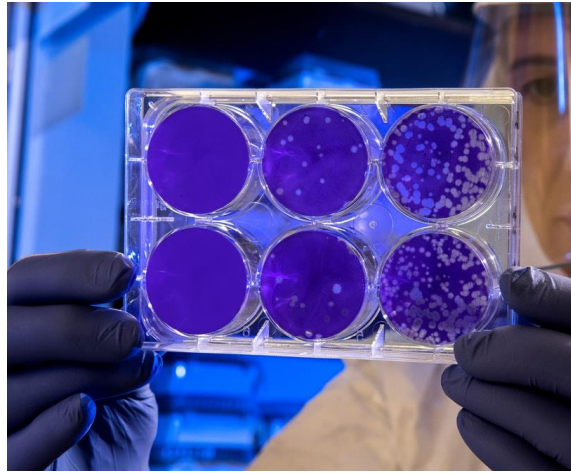
Ways to safety

Social data shows that we are discussing actions to get to safety like avoiding crowds, finding a vaccine, or using products like face masks or hand sanitizer.

Ranked based on co-occurrence between Crisis Behaviour and Safety sub-lens



1. Avoid Crowds



2. Vaccine development



3. Wear face mask

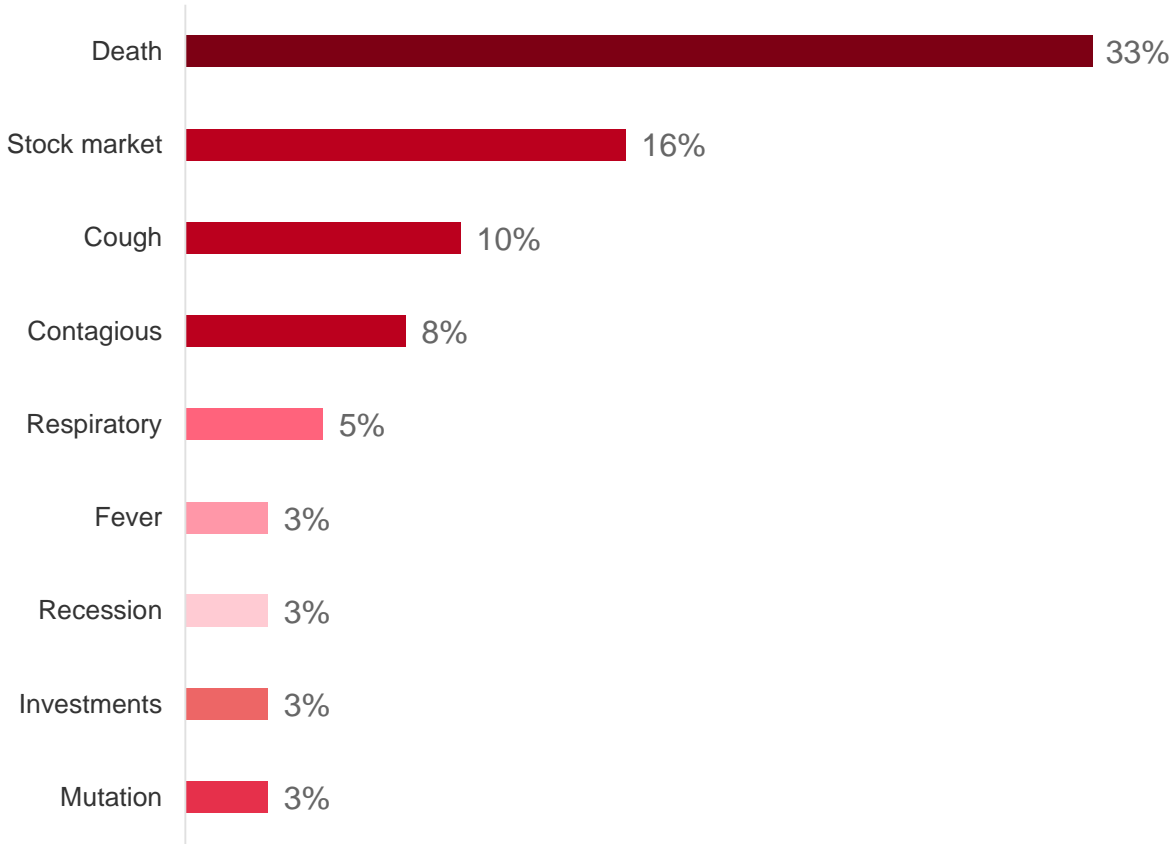


4. Use hand sanitizer

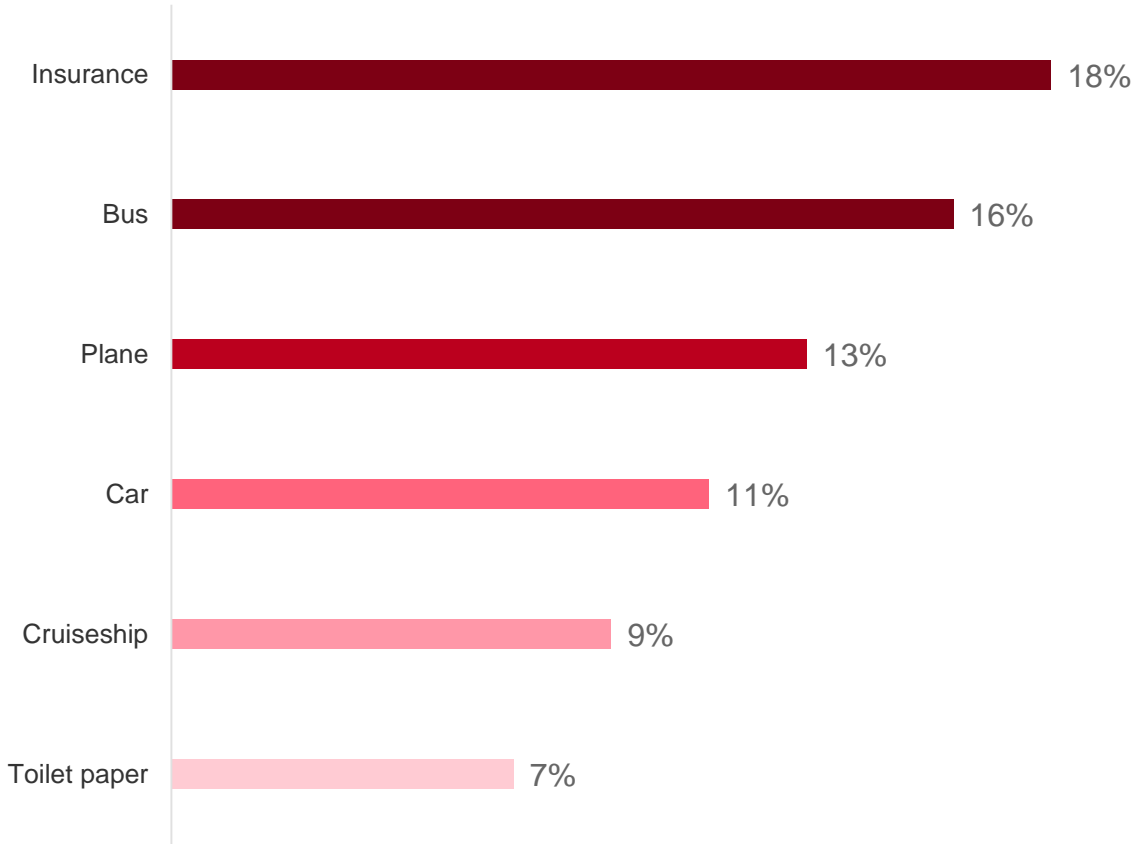
Concerns associated with ‘panicked’ focus on two themes

Symptoms of the virus and the financial outlook are associated with feelings of panic and fear

% of Concern conversation within Panicked sub-lens

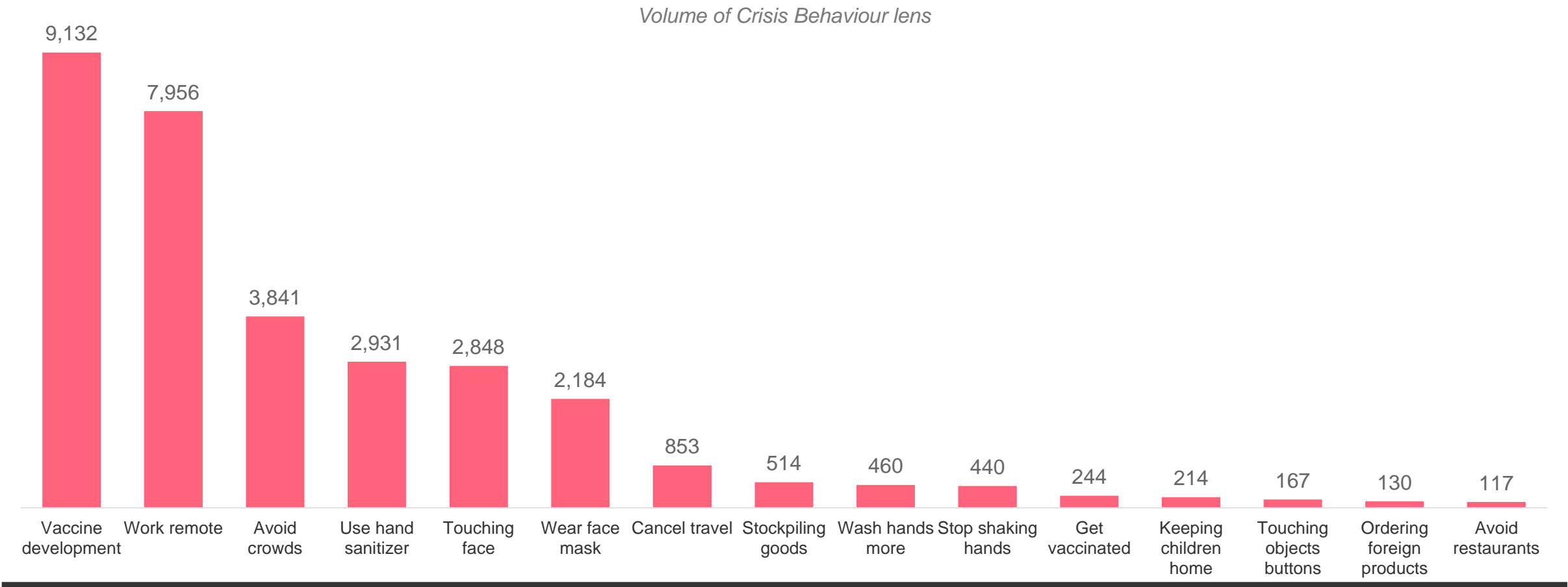


% of Category conversation within Fearful sub-lens



New daily reality and focus on a future remedy

Discussion about the lack of a remedy and the need for development shows a future focus, while action like working from home and avoiding crowds reflect the new daily reality



My home is my new office

The two locations mention the most are 'at home' or 'at work'. The action associated the most with both is working remote, emphasizing the impact it has on people's new daily life.



Volume 'At Home'

37663

20% of 'At home' also
mention 'work remote'



Volume 'At Work'

38714

18% of 'At home' also
mention 'work remote'

The impact on travel and mobility is top of mind in social conversation

Highly ranked sport points to the global cancellation of competitions, while financial services hints at worries about the economic outlook.

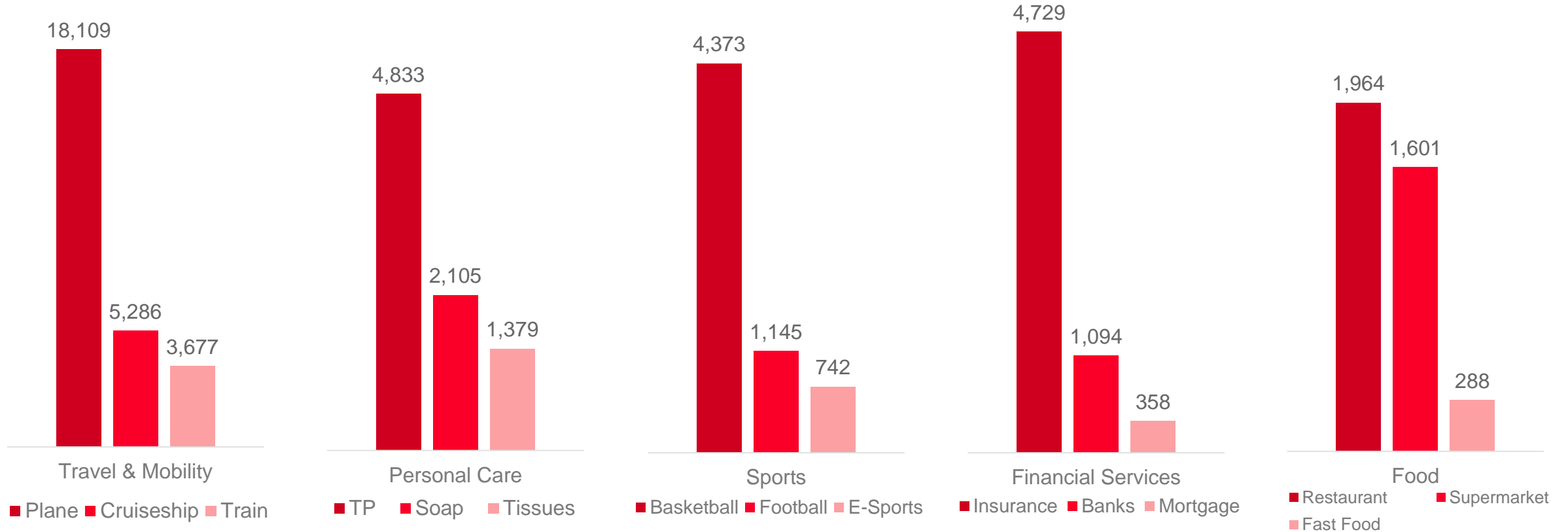
Volume of Category lens



Planes and cruise ships are at the forefront of the category conversation

High volume around insurance points to consumers' future focus and their worries around their coverage.

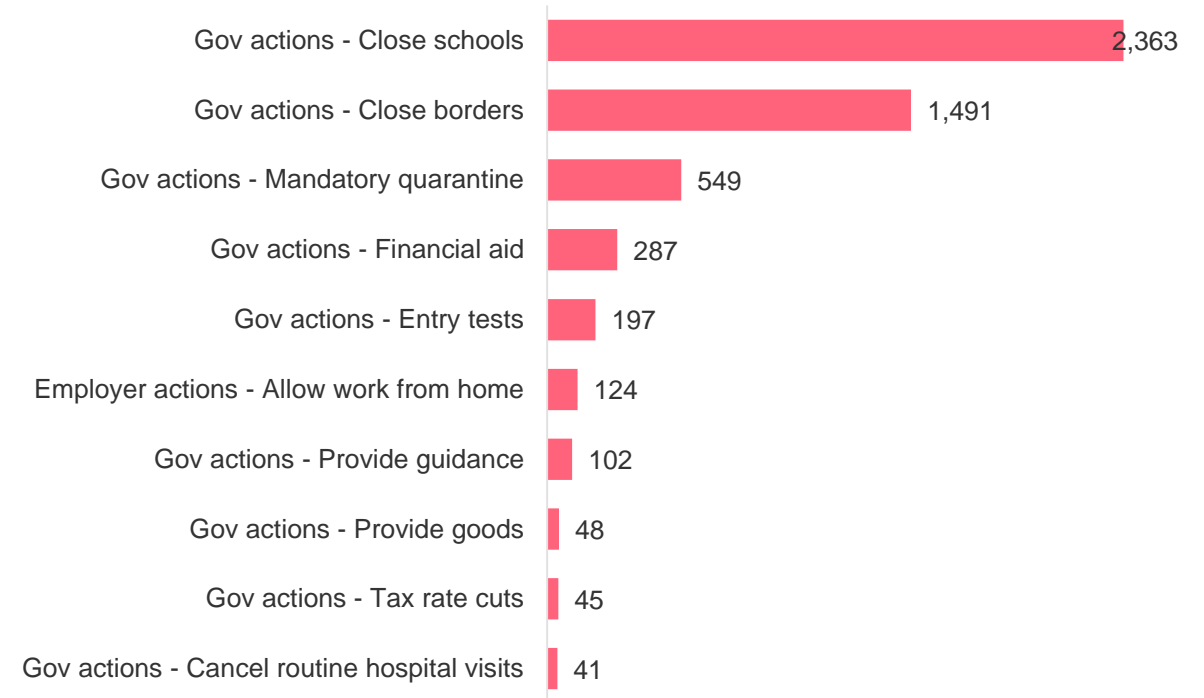
Volume of sub-lenses within each category





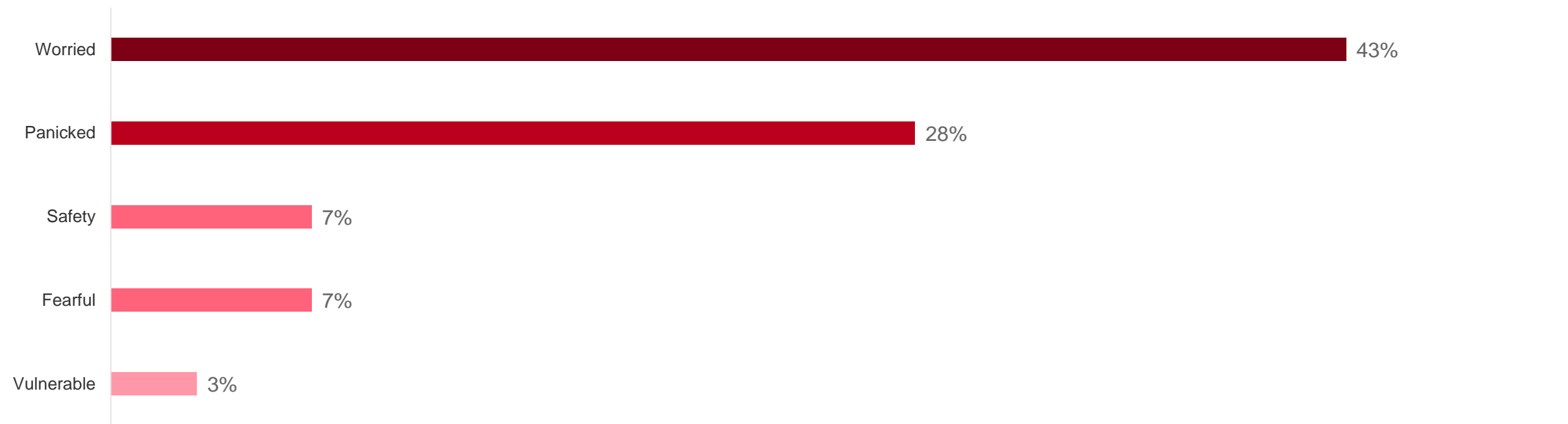
Government actions involving shutdowns rise to the top, whereas employer actions remain more of an afterthought

Volume of Public Opinion lens



Feelings of worry and fear are mixed with the desire for the government's actions to provide safety and protection

% of Emotions & Needs conversation within Government actions mid-lens



Navigating the unknown

Understanding the crisis and running a brand during one

Help me feel safe

We are all longing for safety and security, yet we experience the opposite. At a minimum to be distracted from the inability to find essentials in the stores and do our jobs online.

It will be crucial for your brand to prove that your products and services can close the gap between need and emotional state. Be clear about changes to your company, and be matter-of-fact in tone. Honesty and clarity are themselves reassuring.

Where to find me

Cancelled events, working remote, and travel bans force us to remain at home and will lead to increased time spent online. We will be found shopping online, streaming content, and looking for information online.

Be sure to be accessible without forcing yourself on me. Advertising will come back to normal after, so if for now you can help me deal with the situation, do, otherwise don't worry, it won't be as long a disruption as you think.

Thoughtfulness

If you run a brand in a highly-disrupted category (travel, hospitality etc.), it will be incumbent upon you to win back trust. Reassure, and be human and transparent.

Consumers know it's hard for lots of companies, but they are also busy dealing with sick loved ones. Focus on what you will do in 6-12 months, not telling consumers what you are doing now.

Step up

Government, companies, and healthcare system are all organisations I am leaning on to help me and everyone I know and love get through this. You have a huge impact on my daily life and I am trusting you to be responsible, reliable, and reassuring.

If you can do anything to help health workers, essential workers, or everyday people locked up. If not, make room for those who can help. No matter what, don't be opportunistic.



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THANKS!

Please reach out to your Kantar
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