

# KANTAR :) Affectiva

Authentic empathy:  
How marketers  
should respond to  
COVID-19

27 April 2020





# What we'll cover

- What are people's expectations of brands in the crisis?
- What sort of advertising resonates right now?
- How do people respond to 'business as usual' ads?
- Is there anything I need to avoid?
- Looking forward – peak and post crisis

# Our sources

- Kantar's COVID-19 Barometer
- Affectiva's global emotion AI database of emotional responses to content and advertising
- Kantar's Link database of ad testing results
- Kantar and Affectiva COVID-19 specific ad testing results
- Kantar's CrossMedia and other datasets on marketing effectiveness and shopper behaviour



1  
What are people's  
expectations of brands  
in the crisis?



# If you can help, help

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F1 teams are working with medical manufacturers to prototype and produce ventilators and breathing aids



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Alcohol manufacturers making hand sanitisers e.g. LVMH converted production lines



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Car manufacturers provide credit relief for affected customers



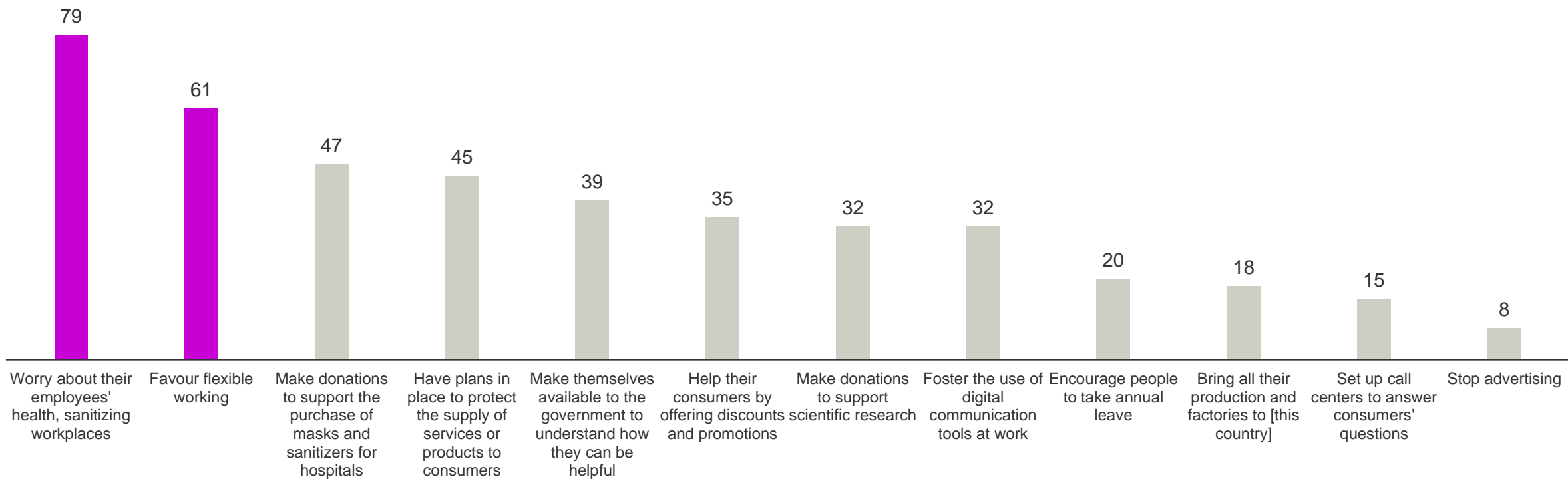
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Danish Retailer Rotunden minimises panic buying through differential pricing strategies



# Look after your employees

What should companies do at the moment...






# 74%

think brands should NOT exploit the situation to promote the brand





Only

8%

believe that companies should  
stop advertising



# Consumers feel life and the economy need to go on, some see advertising as a welcome distraction or a pleasant reminder of more normal times

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“The ad took my mind off my worries while watching it”

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“People need a diversion from what is going on. More people are watching tv”

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“At times like these, normalcy is key to not going crazy or over worrying.”

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“Businesses are fighting for survival. That means they are also fighting for jobs and a healthier economy. Why would you not advertise?”

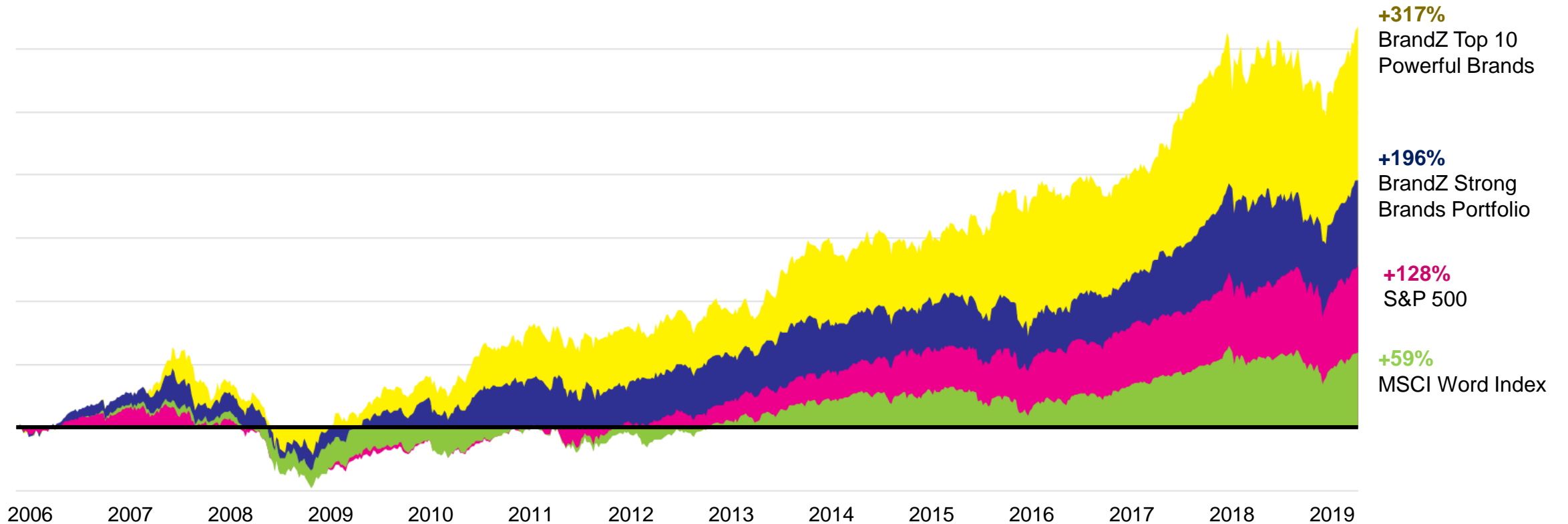
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“We all need to buy things and we need reminders that life will eventually get back to normal”

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“Because even though we are social distancing we must still be able to see ads for products so some parts of the economy can go on. There is also an entertainment factor to ads.”

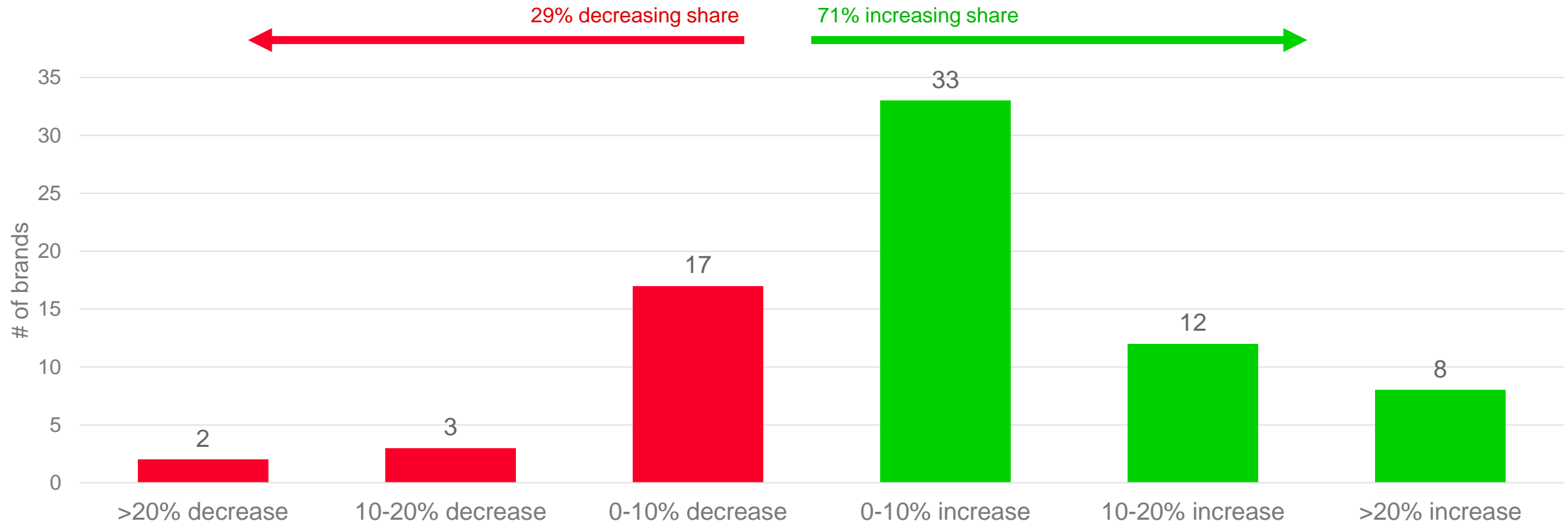
# Strong brands recovered NINE TIMES faster following the financial crisis of 2008





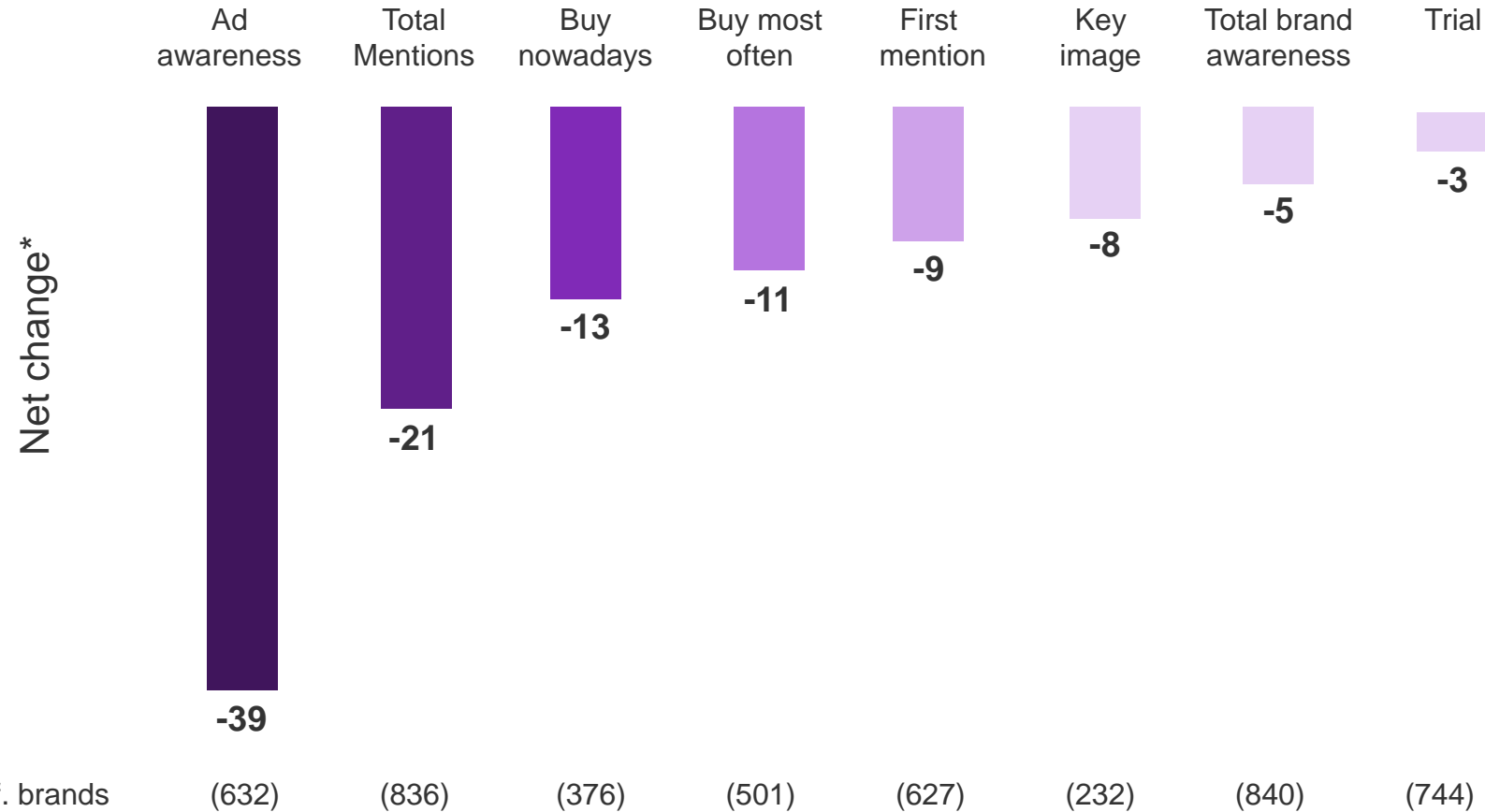
# March was a great month for leading brands

Shoppers reaching for a trusted brand in a crisis (or an availability advantage?)



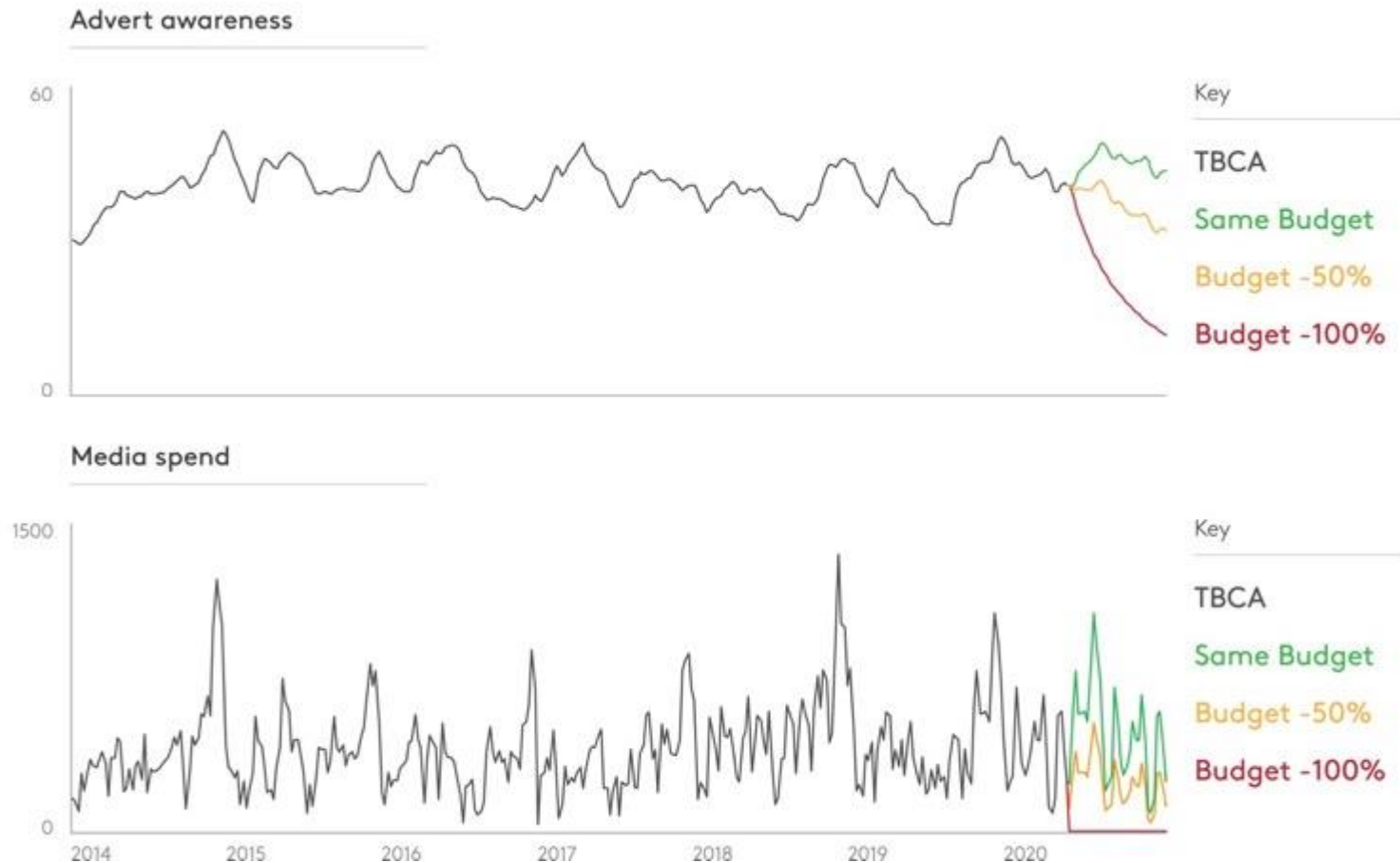
# What happens to brand health measures if you stop advertising?

*Net effects on brand measures 6 months after stopping TV advertising*





**From a brand health perspective, keeping the lights on significantly aids in the recovery phase as it supports brand saliency and reinforces brand strengths**



# For categories in demand you should be looking to advertising

“Doing the right thing” includes doing right by your brand and your employees

This is a time of unique disruption to shopping habits

Brands in categories experiencing **high demand** and **good supply** should maintain or increase spend

Ensuring advertising effectiveness is even more critical now, esp. if spend cannot be maintained

## MarketingWeek

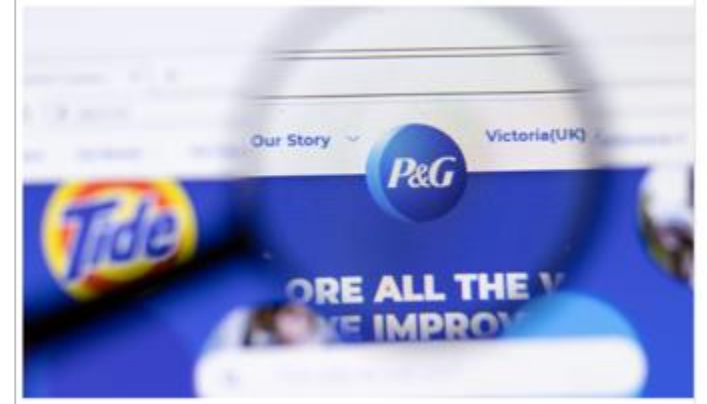
### P&G ‘doubles down’ on marketing as demand soars

*Procter & Gamble has experienced some of its strongest growth in a decade, a sign that it needs to “double down” on promoting its brands so that it “moves forward not backward”.*



By Sarah Vizard & Molly Fleming | 17 Apr 2020

Share this article





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What sort of advertising  
resonates right now?

# Three camps emerging

## 1) Tangible help

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Reference COVID-19

## 2) Pure emotional support

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## 3) Business as usual

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No specific reference

# Ads that acknowledge the crisis and provide tangible help can be very powerful



[Watch the ad](#)



# Tesco's ad is effective and hugely appropriate

# 70%

Feel the ad is very  
appropriate in this situation



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This is not a time for business as usual - we all need to adapt, and Tesco have done a public service by calmly role modelling the steps we should all take to protect ourselves and others.

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I think its a good advert. At the moment people are interested in safety measures so it grabs your attention. Links to the Every Little Helps slogan too. I like how all the people in the advert are staff, it makes you think of them and the lengths they are going to.

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People want to know if they go out shopping, they will be safe. They will want to know what safety measures Tesco are adopting.

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It gives clear explanations of what shoppers can expect from their shopping experience during the COVID-19 crisis. It does not try to advertise Tesco products, but focuses entirely on the safety of shoppers and workers.

# There is an appreciation around how Tesco is doing their bit to help

Brand Saliency	Top 5%
Message take out : Tesco is making it safe for me to do my shopping in the store	Top 5%
Short term sales likelihood	Top 10%
Power	Top 15%
Meaningful	Top 10%
Different	Top 30%

# Unpredictable | Hyundai Assurance



[Watch the ad](#)



# Hyundai's offer to help customers affected with credit payments is a pleasant surprise and well received



Care is needed...



[Watch the ad](#)

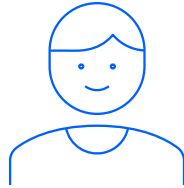
# Overall results not as strong as Tesco – *how* Birds Eye helps is unclear

Emotional Expressiveness	Top 20%
Brand Salience	Average
Message take out: Birds Eye is helping people in whatever way they can	Bottom 30%
Brand Power	Average
Short term sales likelihood	Average

## As a result, the ad is seen as less appropriate

41%

say it is “Very Appropriate”  
(vs 70% for Tesco)



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I don't really see how a frozen food company are helping people get through lockdown - this mainly comes across as an attempt to boost sales.

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The ad isn't bad, but it just seemed as though they were altering their normal advertising to suit the virus.

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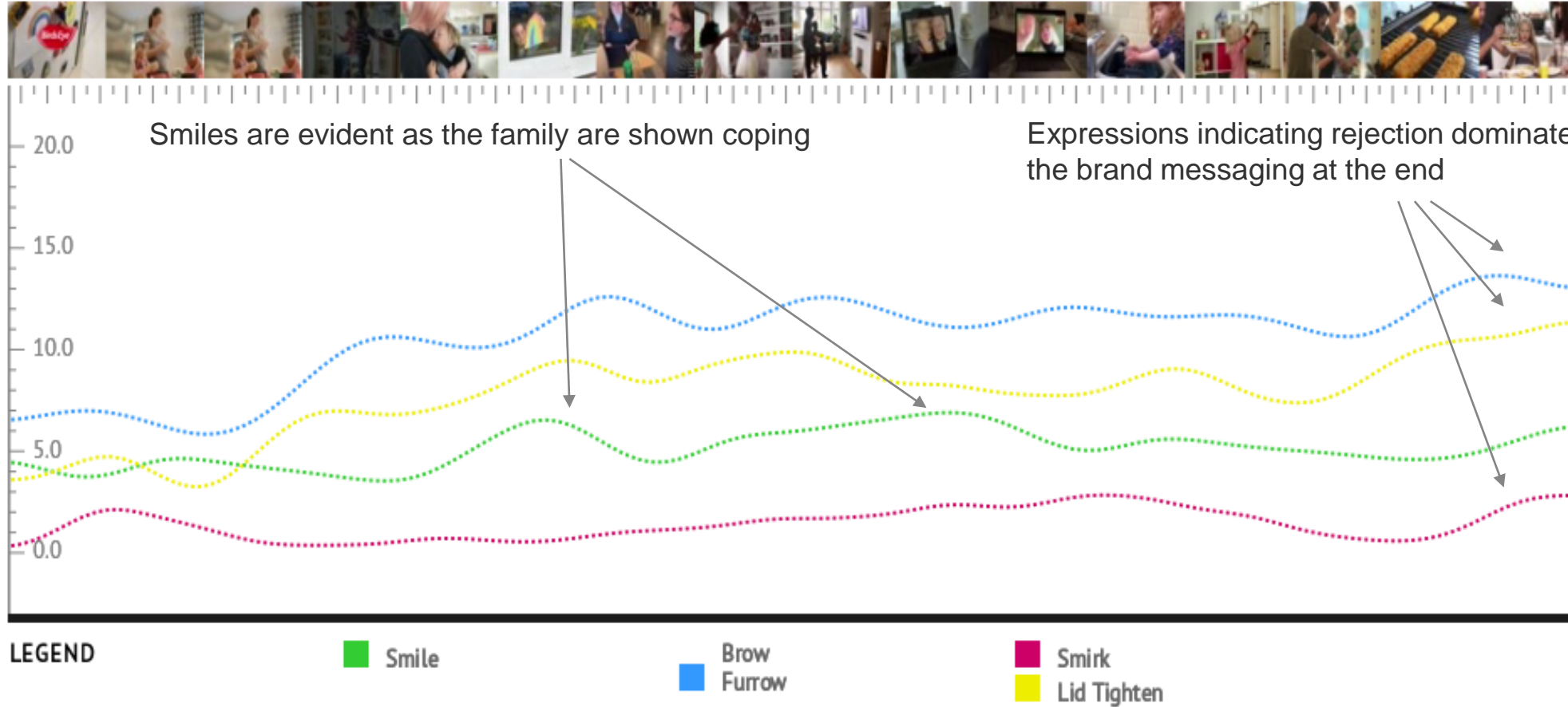
It reminds us that Bird's Eye exists and suggests it's doing something for people during the lockdown without specifying what this might be.

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It felt quite pointless and didn't really say much. If you are going to claim that you are helping in any way that you can. You need examples of that in the advert and not just a web address to go to.



# Family togetherness imagery is emotionally resonant – but confusion is evident about the point of the ad

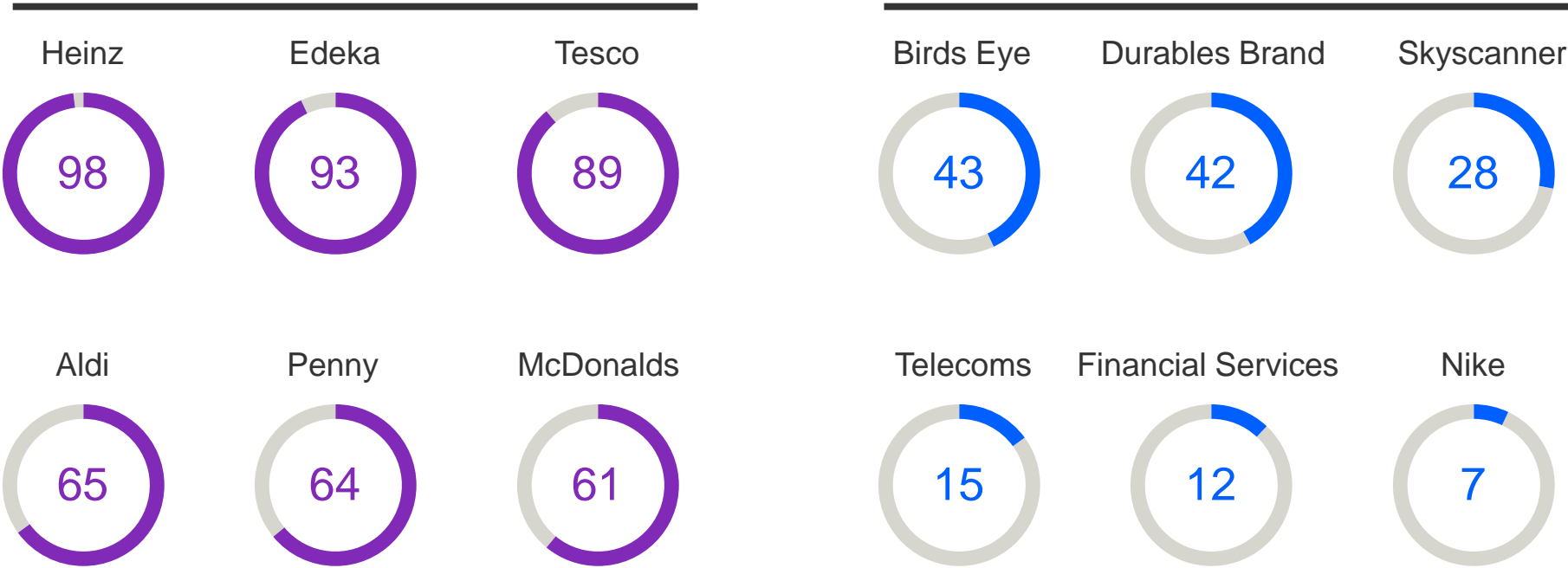


# Ads that show clearly how your brand helps have greater potential to drive stronger long term equity gains for the brand

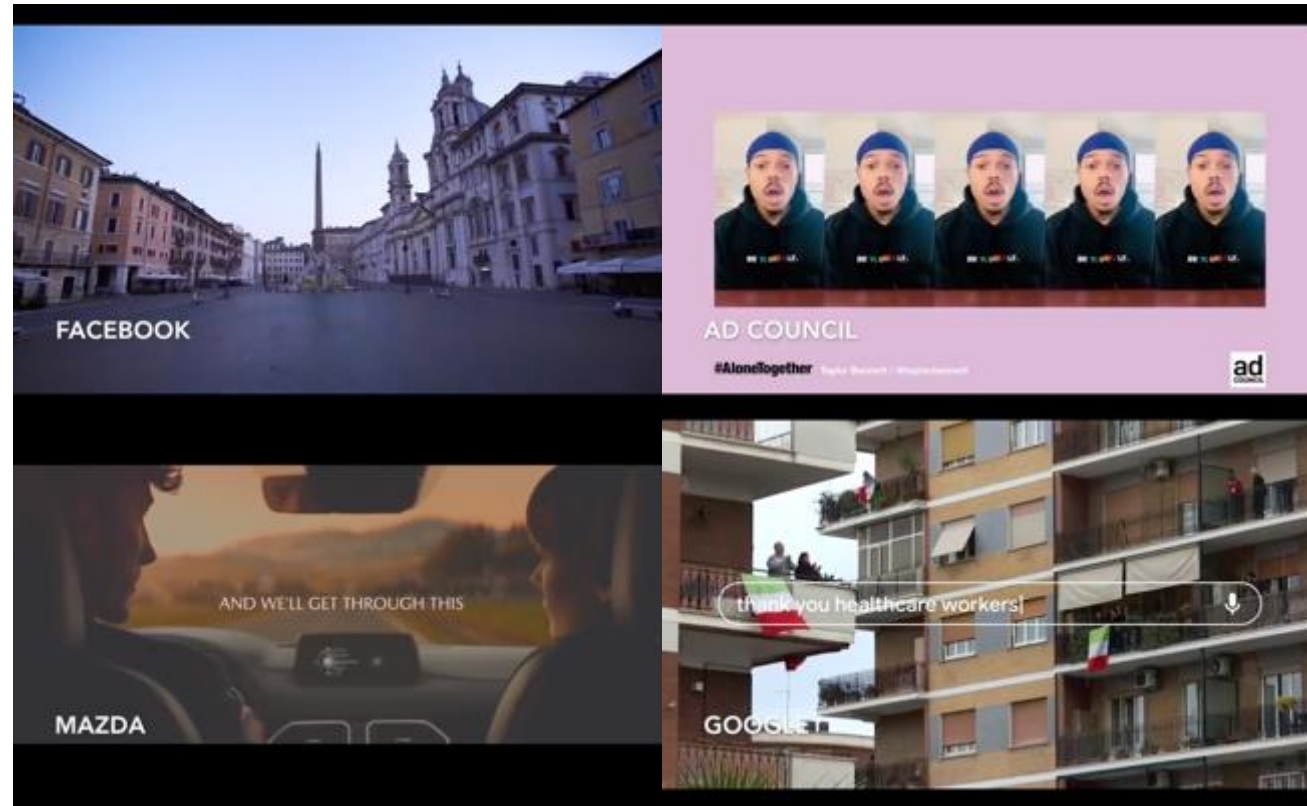
## Brand Power

Ads showing how brands help the fight or help people day to day

More emotional ads offering hope or encouraging good behaviour



**This is a time for authenticity: If you talk about COVID-19, ensure you can help in a meaningful way, or there is the risk of a backlash...**



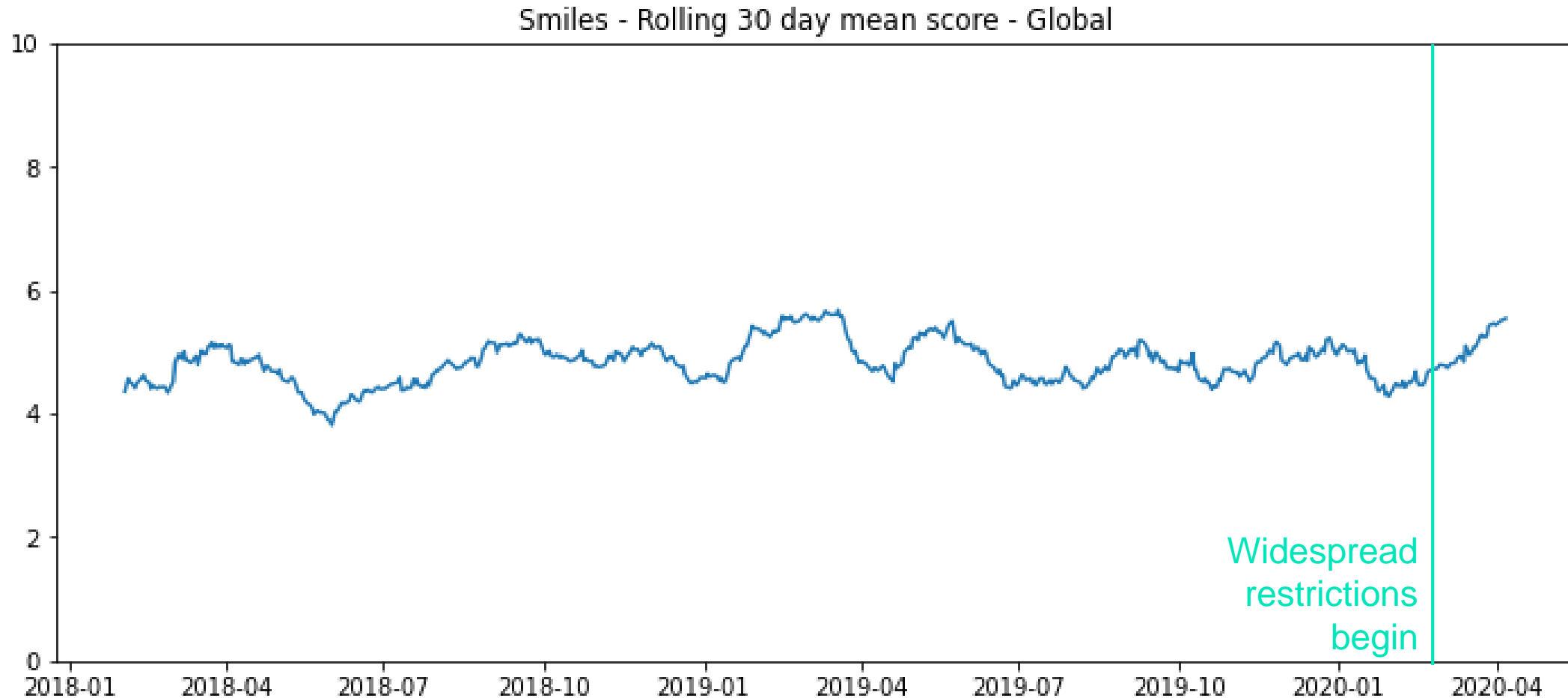
[Watch the ad](#)

3

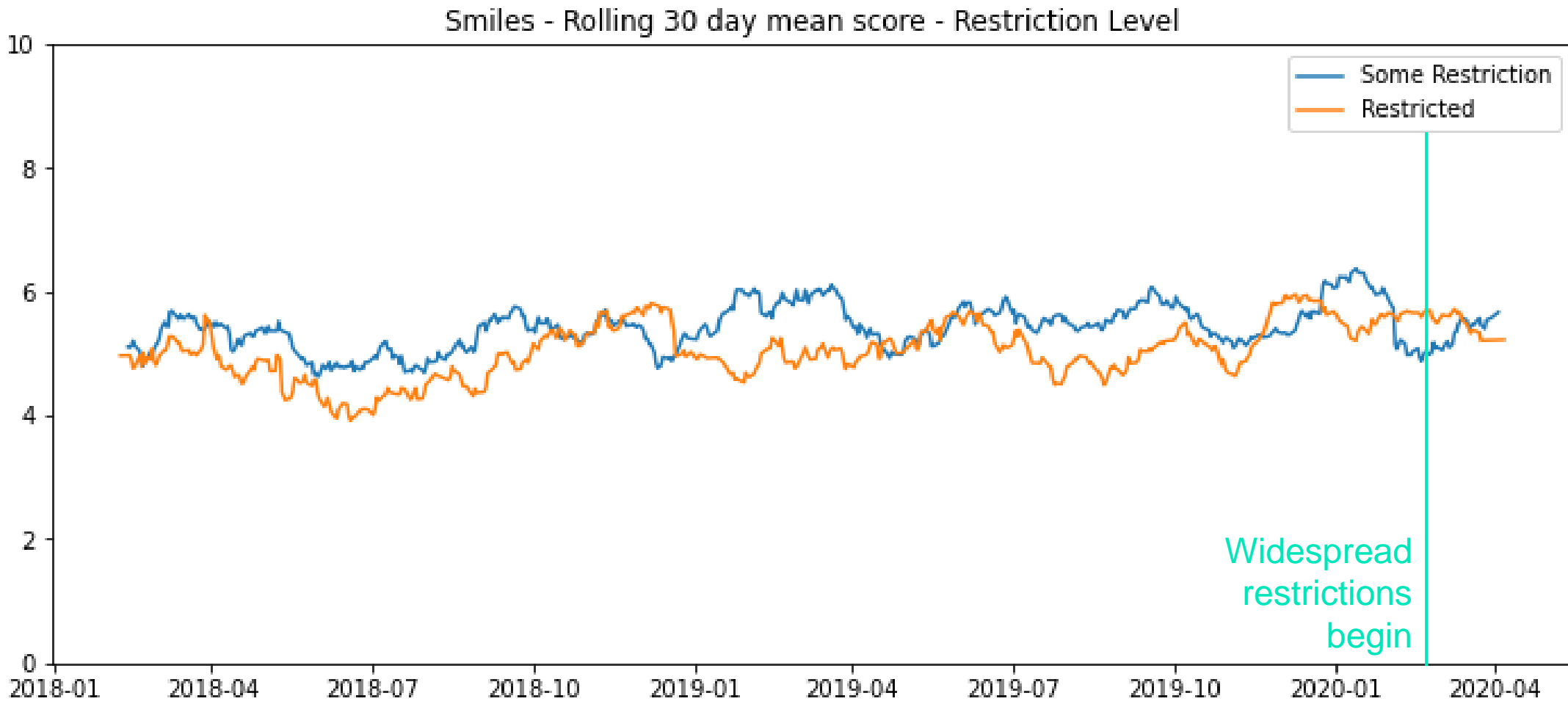
How do people respond  
to “business as usual”  
ads?



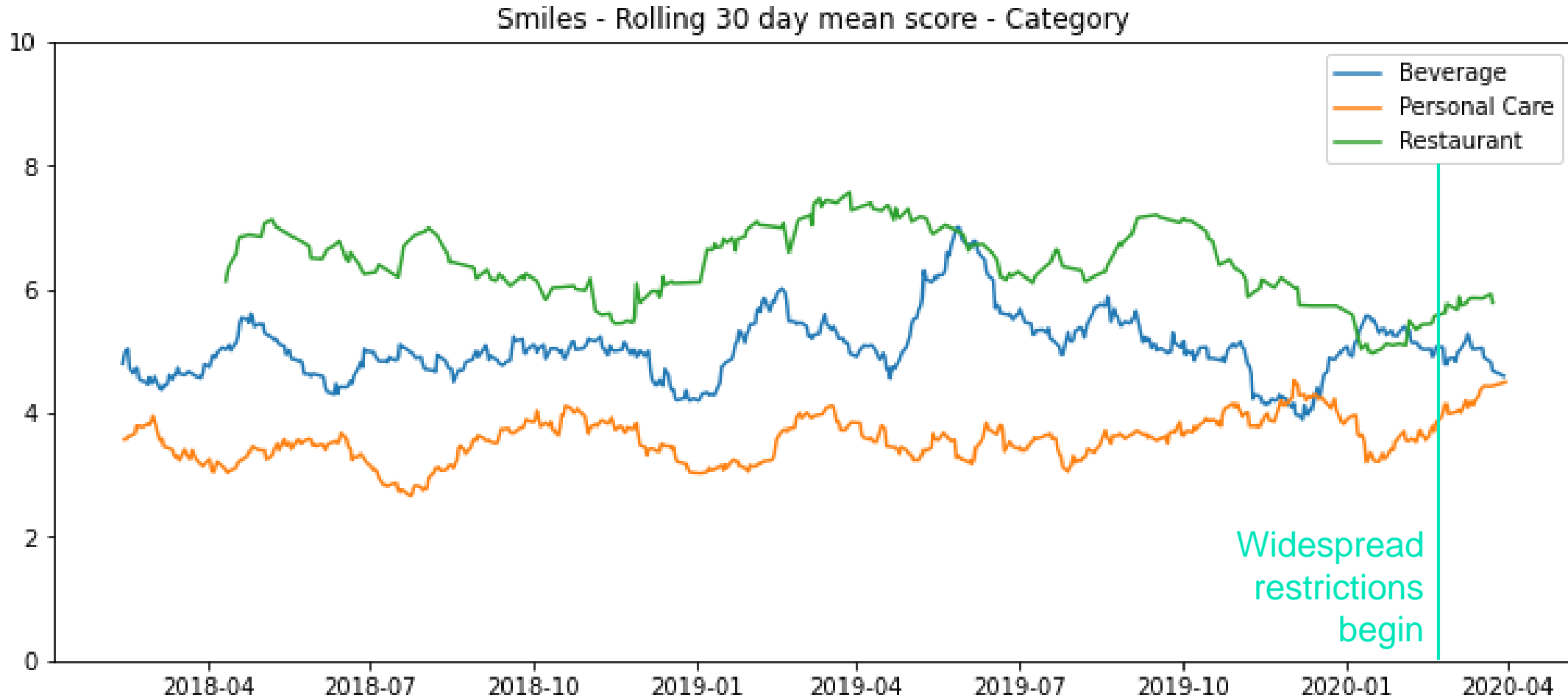
# There is little evidence that people are responding differently to advertising during the lockdown



The picture is similar if we look at countries with varying levels of lockdown



..and still the same if we look at categories that we might expect to be differentially affected



# Parallel study: are there any differences in the way consumers respond to advertising as a result of the crisis?

## KANTAR MARKETPLACE

### Markets covered



Australia



Japan



Brazil



Philippines



China



New Zealand



France



Thailand



Germany



UK



Italy



US

### Categories covered



Food



Household products



Drink  
(alcoholic & non-alcoholic)



Retail



Entertainment



Automotive



Services














Technology



# Overall response to advertising has not changed significantly

Market conditions may mean response varies, but consumer engagement with existing copy is not fundamentally changed by the crisis

	Before crisis	During crisis
Brand Salience		
Short term sales likelihood		
Power		
Branding		
Enjoyment		
Involvement		

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Is there anything I need  
to avoid?



# 38%

Believe that brands should avoid using humorous tones in advertising

Even in heavily locked-down Italy and Spain, less than half think humour in ads is inappropriate

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I want fun stuff. We are bombarded with too much sad and scary stuff at the moment.

**New Zealand**

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Having a sense of humour during what is a very dangerous and difficult time may help us all smile a little.

**Australia**

# Canal+ Mission: Really Impossible 1



[Watch the ad](#)



# Showing more vulnerable elderly people in outdoor situations is not negatively received in locked-down France

The humour was just as appreciated as when the ad was first tested

## Canal+ Mission Really Impossible

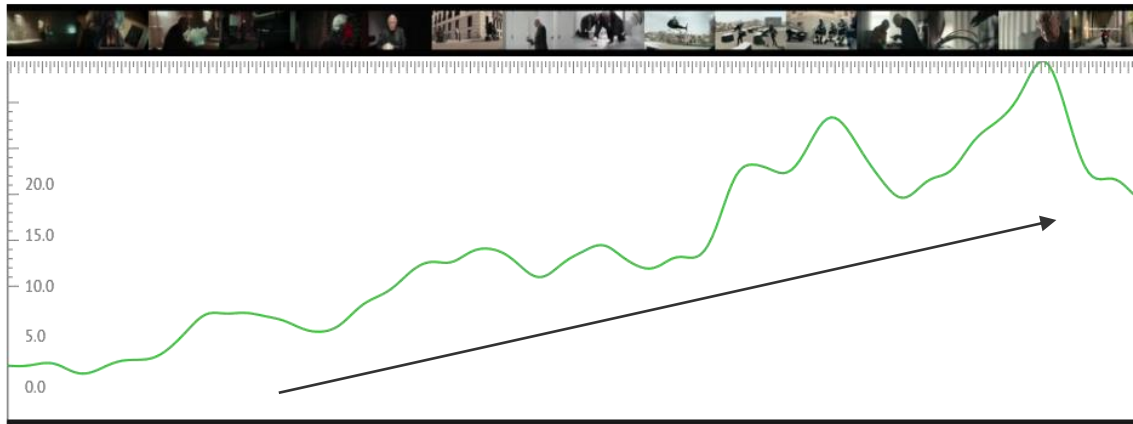
Original (tested in August 2019)

ENJOYMENT

Top 5%

EXPRESSIVENESS

Top 5%



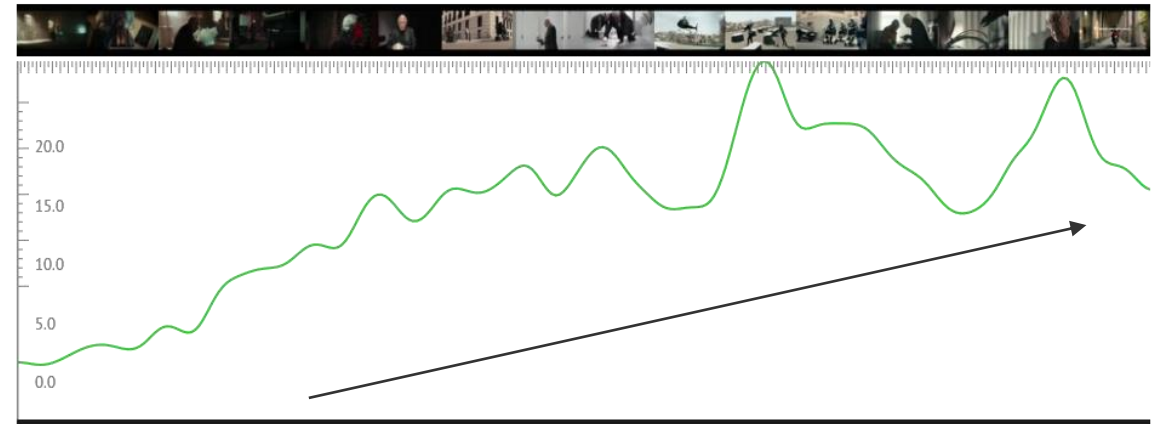
Parallel (tested in March 2020)

ENJOYMENT

Top 5%

EXPRESSIVENESS

Top 5%



## Busch | What beer is that?



[Watch the ad](#)

# Emotional response remains very similar to the same ads



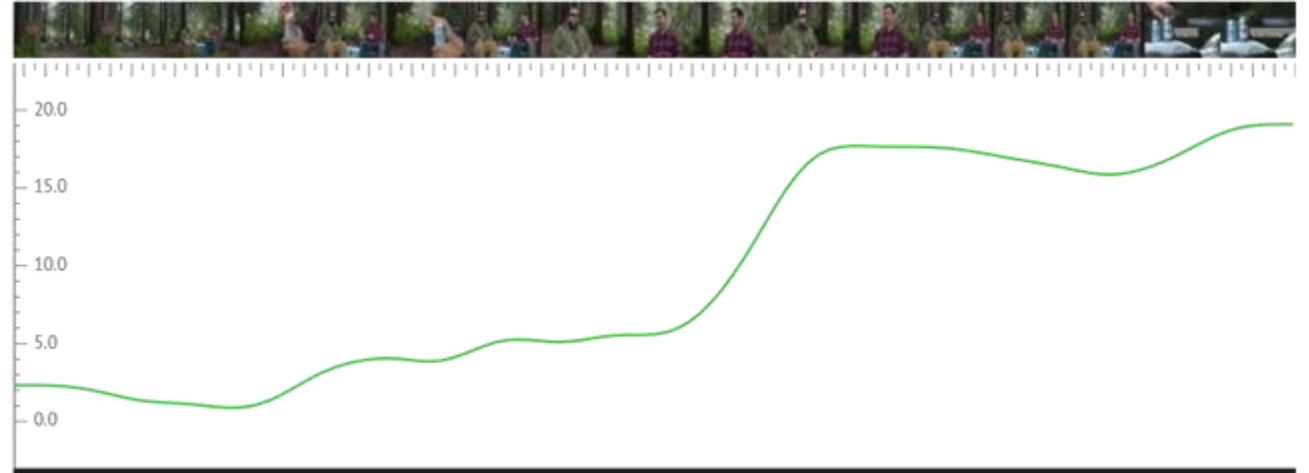
Pre - crisis

EXPRESSIVENESS  
**Top 10%**

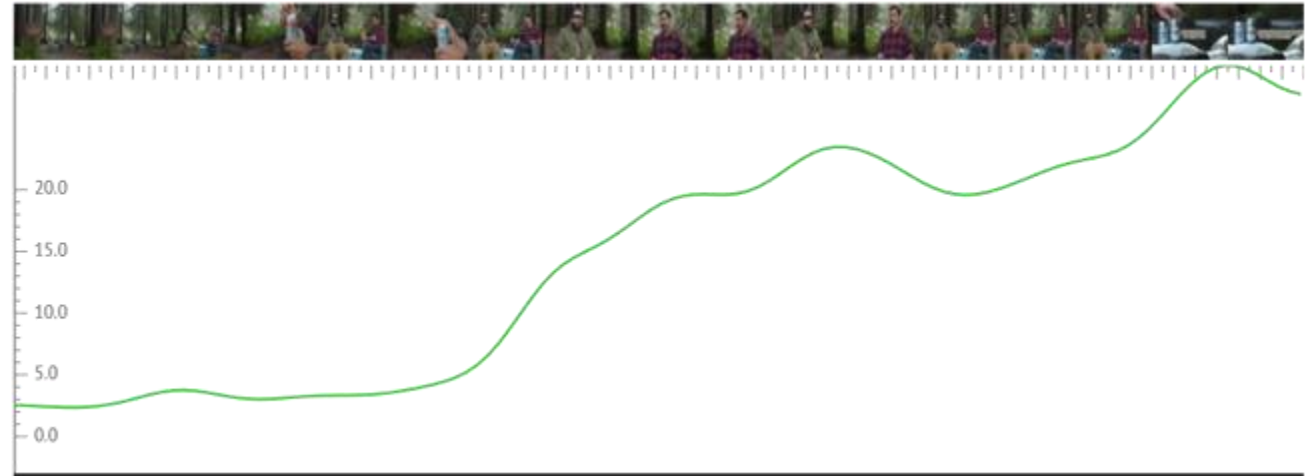
During crisis

EXPRESSIVENESS  
**Top 10%**

Pre – crisis (smiles)



During crisis (smiles)



# Forbidden behaviours don't seem to be an issue if they are part of the narrative, but not the point of it

BBQ party with  
friends and family

USA

Scenes of sports  
with many people

Philippines

Socialising inside  
and outside

Italy

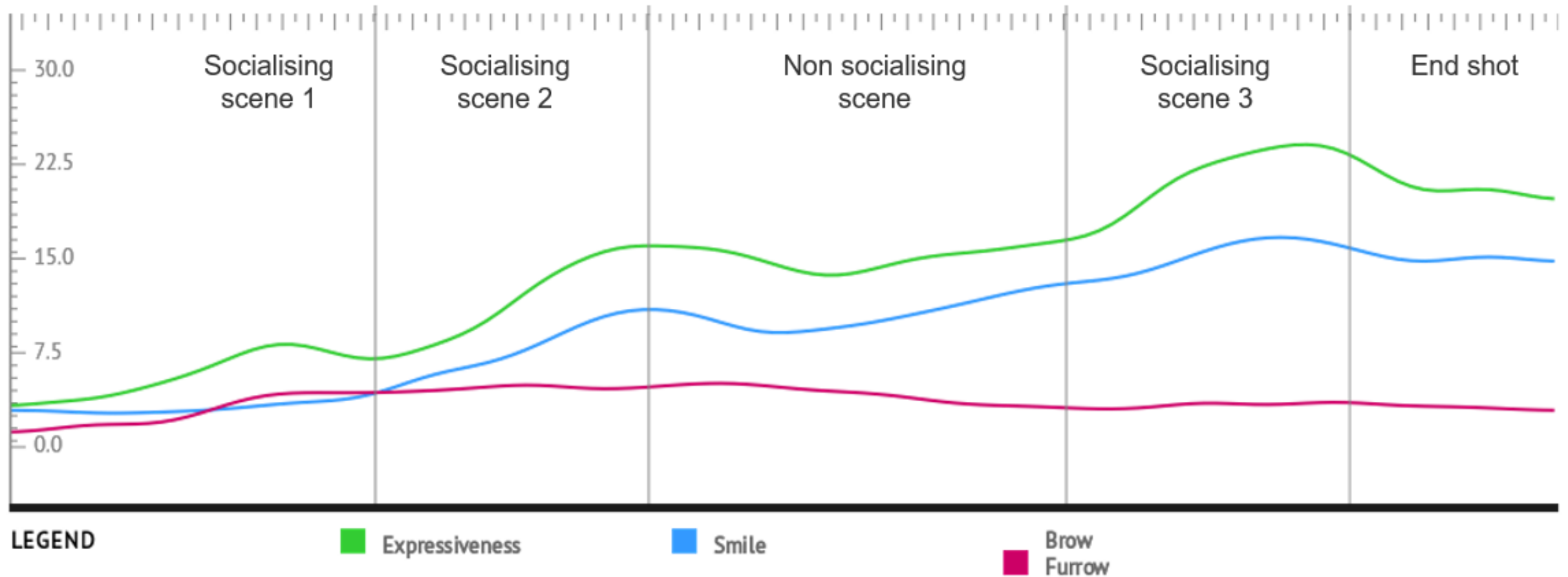
Top 30% on Enjoyment,  
Short-term sales likelihood and Power





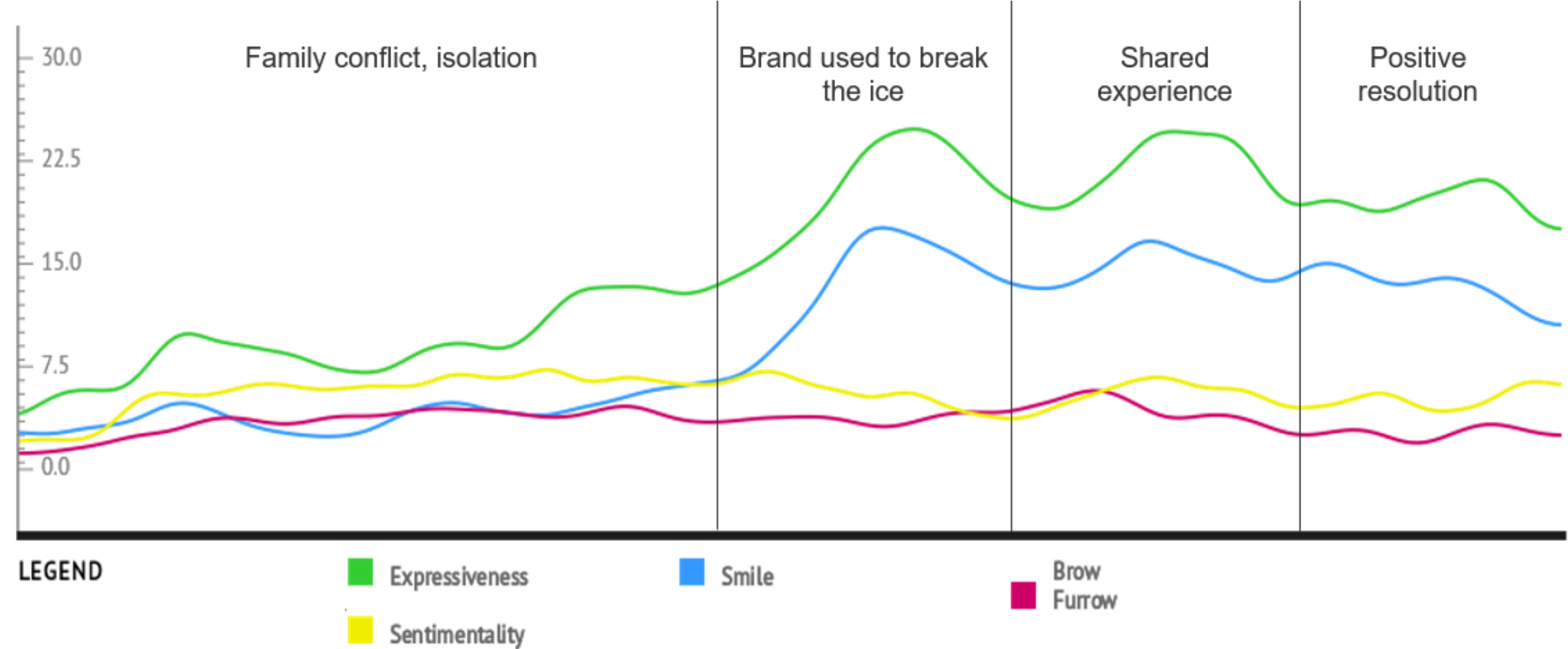
# Italian household brand ad generated a very positive emotional response in the midst of extreme lockdown

Ad featured extensive shots of indoor and outdoor socialising



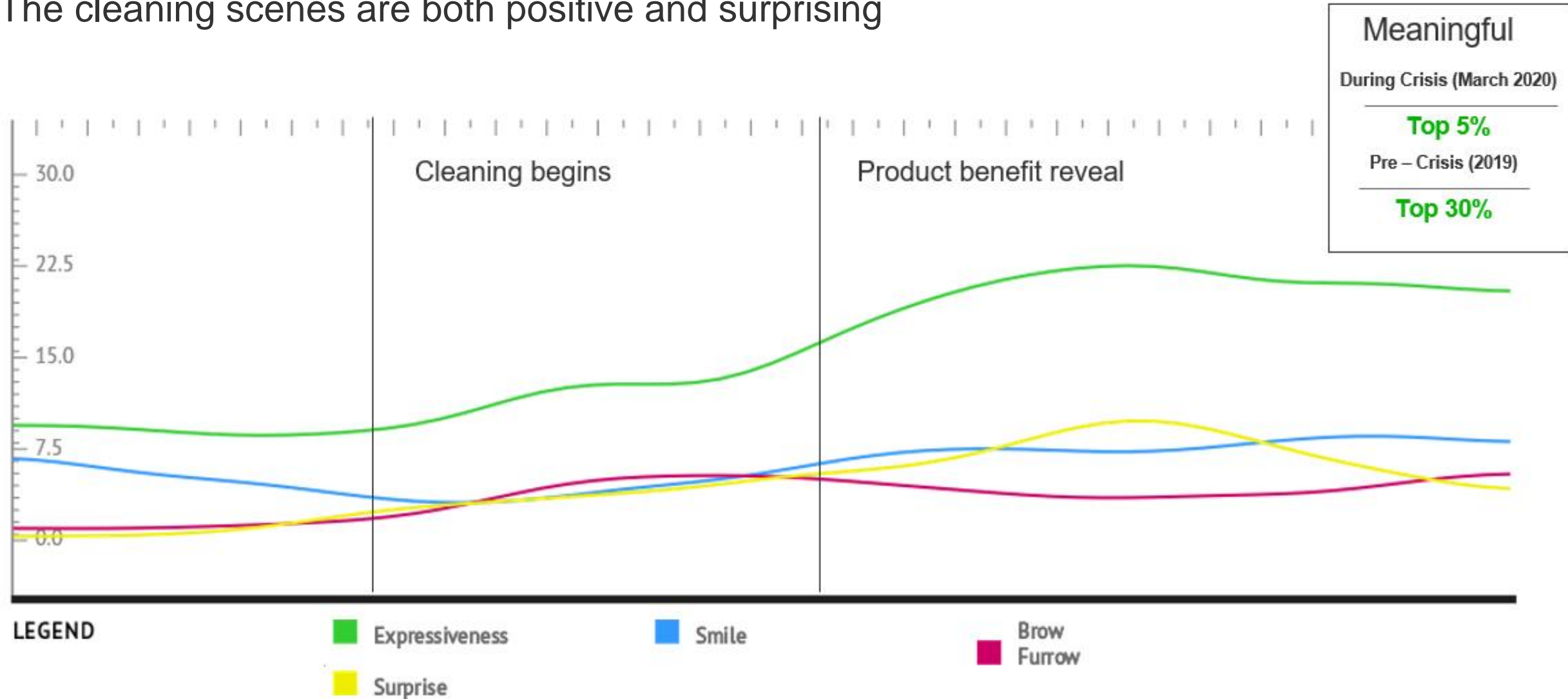


# LATAM ad featuring social isolation and family conflict is still very well received



# US household cleaning ad generates a mix of surprise and smiles, but relatively few brow furrows

The cleaning scenes are both positive and surprising



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Looking forward – peak  
and post - crisis



# Planning for the future

Success post-recession stems from :

Long-term, operational  
cost-base reduction



Increased investment in  
R&D and Marketing to  
develop new opportunities

- - Gulati, Nohria & Wohlgezogen, HBR, 2010



# Planning for the future

## Recovery starts now

Natural to focus on the current crisis and defensive moves

Long term business health will come from planning for the future

- 
- Stay connected to your customers
  - Think hard about long term impacts of any new normal – and opportunities (or distractions) this may bring
  - Invest in brands and new opportunities
  - Make every \$/£/Euro count
-



# Summing up

Step up: People expect brands to help if they can, look after their staff, and behave responsibly

Pulling marketing spend carries risk and is not expected by consumers. If you can advertise, you should.

If you genuinely help, showing how is powerful.

Don't force it: "we're all in this together" is not cutting it any more

Business as usual ads are ok - People see marketing for what it is

Stay close to customers: consumer research is still valid and can make the difference now and in the long term

Strong brands can survive this – but the time to make the right decisions is now

