



COVID-19 RESTART PLAYBOOK

Brand planning for
changing times



“

Covid-19 has opened up new conversations from those who are looking to us to help prepare for ‘The Great Reset’ in consumer behavior. Pent-up consumerism will make this an historic opportunity to grab and defend market share.

- David Shim, CEO, Foursquare, in TechCrunch on April 6, 2020

CHECKLIST

As the country gradually reopens for business, brands and agencies that are not actively planning new strategies and staying ahead of the global restart will be left in the lurch in a post-pandemic world.

With consumer behavior and spending patterns rapidly evolving, marketers must take all necessary steps now to defend existing business, win new market share, and ensure that their solutions and goals align with our new consumer reality during this critical time.

This Playbook offers a series of steps for re-launching your marketing and media plan so you can exercise a first mover advantage as new consumer behaviors take hold.



Reassess your audience

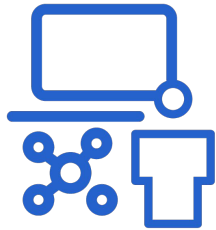


Craft your messaging



Realign your media plan

1 REASSESS YOUR AUDIENCE



How has the pandemic affected your audience and segmentation?

- ❑ Have the disposable income and product interests of your audience changed?
- ❑ How have your audiences been impacted in different areas of the country?
- ❑ Is the mindset and experience of your audience targets still changing? Are they evolving week-to-week? (frequently the answer to this is Yes)
- ❑ Are you looking to defend existing market share or push to win new share?
- ❑ Should your propensity scores be revised?

2 CRAFT YOUR MESSAGING



Should your messaging be updated?

- ❑ How has consumer sentiment shifted toward your brand and competitors in the context of the crisis?
- ❑ Are you driving brand awareness for share-shift or lower-funnel purchase intent?
- ❑ Does the tone of your messaging align with consumer experience and stress levels during this time?
- ❑ Are you facing any supply chain constraints that may require different messaging by region?

3 REALIGN YOUR MEDIA PLAN



What strategic adjustments will help you adapt to a U.S. economic restart?

- ❑ How has your audience's media consumption changed?
- ❑ Can you first test your audience and messaging insights in email or other owned media?
- ❑ How has your audience distribution across TV and digital changed post Covid-19?
- ❑ With the TV Upfronts evolving, are you using real-time viewership data to help evaluate a new way to invest? Are you leveraging technology to help with flexibility, strategic audiences, and ADU's?

EXAMPLES & INSIGHTS

REASSESS YOUR AUDIENCE

Finding new and innovative ways to reach and engage audiences can be a challenge for any marketer, especially during and after a global crisis. A lack of timely and meaningful audience insights for cross-screen targeting intelligence can severely limit effective planning and campaign execution.

Now more than ever as the economy restarts, brands and agencies need to get ahead by accessing real-time data about trends, topics, behaviors, interests, and sentiment so they can better assess shifts in consumer behavior and unlock new planning opportunities across the web, social, mobile, video, and TV platforms.

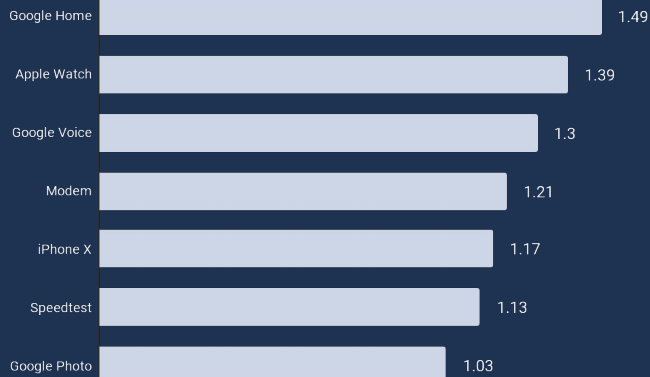
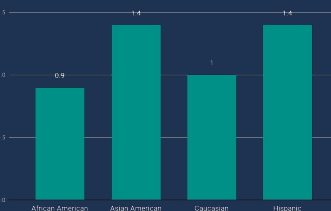
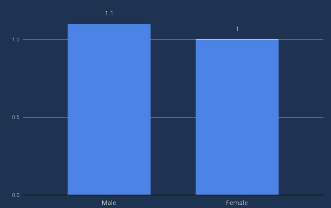
Demographic profile and leading interests:

Affluent millennials
Mar – Apr 2020



Affluent millennials:

In the example below, we see a significant consumer behavior shift among affluent millennials before and during the pandemic as their consumer interests skewed from travel to technology products that would enhance their new stay-at-home lifestyle, and financial guidance for an unpredictable future.



REASSESS YOUR AUDIENCE

Online shoppers:

Looking at another sought-after segment, the following analysis shows how age distribution changed during the pandemic for online shoppers, indicating how even slow moving data like demographics can be impacted in such a short amount of time. As greater numbers of older people were trying to buy groceries online for the first time, they ended up skewing segment strategy and may not actually be part of your desired audience.

In the same way that “online shoppers” used to imply a younger demo, you can no longer maintain any of these assumptions across categories. Brands need to thoroughly re-examine their audience models during the Covid restart. Consumers that fit your target buyer six weeks ago are very likely not the same today, and they may not be the same by the end of May.



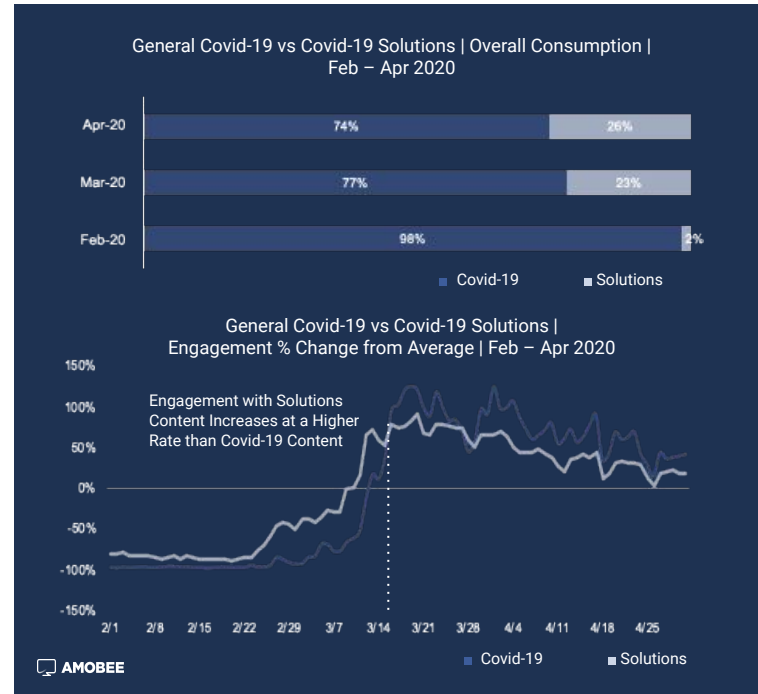
CRAFT YOUR MESSAGING



Brands that are locked in legacy campaign strategy and lack self-aware insights on how consumer sentiment has shifted over the last 60 days run the risk of coming across as tone deaf in communications to new and existing customers.

Market data indicates that consumers are quickly pivoting as they look for new product and service solutions. While many brands' initial Covid-19 response focused on conveying empathy to consumers during social distancing restrictions, a leading-edge creative strategy two weeks ago has quickly become outdated.

Media messaging that speaks specifically to new behaviors taking shape will likely have a significant market advantage.



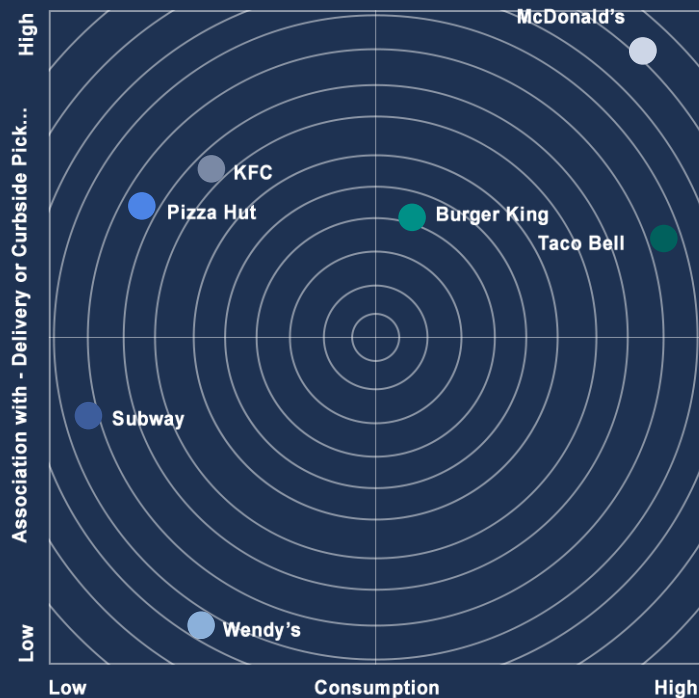
CRAFT YOUR MESSAGING

QSR brands & changes:

Looking at the QSR category specifically, consumer preference during the pandemic shifted to curbside pickup and takeout. While McDonald's is so far the winner of this messaging opportunity after investing significantly in its UberEats partnership and contactless drive-thru campaigns, recent data shows the competitive landscape among some of today's top brands, such as Subway, Burger King, Wendy's, Taco Bell, Pizza Hut, and KFC, and how they revised creative strategy to maintain consumer engagement and support growing demand for new delivery and pickup options.

Once you have new messaging insights directing your creative, the first thing to consider is A/B testing revised creative. The best place to efficiently test new messaging is in owned and operated media, like your website and email channels.

Competitive Landscape | Top 7 QSR Brands
Dining Out Content Only | Apr 1-27, 2020



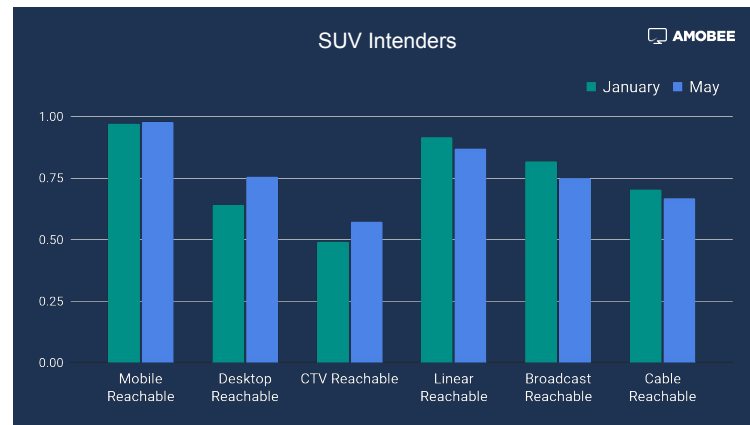
REALIGN YOUR MEDIA PLAN

The next big shift in consumer behavior is channel consumption. Home isolation has accelerated consumer time and financial investment in streaming products like Hulu, Sling, Tubi, Pluto, and Roku, which create increased scale for time-shifted TV experiences.

With a substantial increase in news consumption paired with a corresponding drop in live sports, advertisers need to take a hard look at their existing network and daypart mixes in broadcast TV. According to eMarketer, TV ad spend is expected to drop by up to 29% in the first quarter of this year. Luckily, with a rise in addressable inventory on the biggest screen in the home, there is ample opportunity to fill in the delivery gaps of any adversely affected TV commitment.

The data below shows how SUV Auto Intenders have evolved across all screens and channels before Covid-19 to now. This example shows the shifts in the same SUV Auto Intender segment with respect to audience availability in mobile, desktop,

CTV, broadcast, and cable channels between January and April of this year. While Mobile remained flat, we see gains of 11% in Desktop and 9% on CTV, as well as a drop of 5%, 7% and 4% on Linear, Broadcast and Cable respectively.



REALIGN YOUR MEDIA PLAN

Grocery and stock shortages quickly became a stark reality during the pandemic, putting many brands and their competitors in a precarious position.

With real-time data visualizations on American consumption trends and stock availability, brands can more easily get ahead of potential shortage issues, allowing them to cut media spend where their products have run out, and heavy-up in geo-locations where competitor stock is in short supply.

Starcom & Kraft Heinz reduce waste

By optimizing media targeting, ads were served only to *relevant* in-store locations

Goals

- Generate awareness of a new product launch with Kraft Heinz's agency Starcom across markets to drive relevant in-store visits
- Concentrate media spend in ZIP Codes carrying the new product and eliminate advertising spend where consumers are unable to purchase product

Results & Insights

66%

Prevention of potential media waste

29%

Increase in campaign budget reach



KraftHeinz

KEY RESTART TAKEAWAYS

- No matter what vertical you're in, your audience has changed over the last 60 days and your propensity modelling needs to change with them.
- People that were in-market for your product may not be now, or you're faced with an entirely new audience that you need to adjust your messaging for.
- To survive and thrive in a post-pandemic world, you need to know who your audience is, where they are, and how you can most effectively communicate with them.





GET STARTED

COVID RESTART: TURNKEY ACTIVATION WITH AMOBEE

For qualified campaigns, Amobee can provide the following analytic and activation solutions:

Audience & messaging tools

Covid sentiment and market trends analysis	Weekly	Customized Covid-19 analytics pack tracks changes in consumer engagement and sentiment for your brand, competitors, and pandemic topics of your choice.
Pre/post Covid audience analysis	Monthly	Analyze your existing audiences for changes in income demographics, product interests and brand sentiment from March to current time period.
TV-aware digital plan	One-time	Plan across screens with a reach curve analysis of your Linear TV schedule coupled with an omnichannel programmatic forecast of proprietary TV Amplifier segments.

Media tools

Contextual brand safety filters for pandemic topics	Unlimited	Dynamically suppress non brand safe content, with filters that optimize away pandemic related topics as they evolve throughout the flight of the campaign.
In-flight brand-specific covid association and trend report	Monthly	Ongoing consumer engagement, sentiment and pandemic trends analysis packs to drive optimization of messaging and media in-flight.
In-flight cross screen reach report	Monthly	Household and person based reach and frequency across TV, CTV, Desktop and Mobile.
In-flight media waste report	One-time	Media cost waterfall analyses to measure and optimize working media over campaign flight.
Campaign management services	Available	All aspects of analytic services, media planning and campaign execution can be fully managed by Amobee on behalf of your brand.

1 REASSESS YOUR AUDIENCE

How has the pandemic affected your audience and segmentation? Write your responses below on the right.

Have the disposable income and product interests of your audience changed?

How have your audiences been impacted in different areas of the country?

Is the mindset and experience of your audience targets still changing?
Are they evolving week-to-week? (frequently the answer to this is Yes)

Are you looking to defend existing market share or push to win new share?

Should your propensity scores be revised?

2

CRAFT YOUR MESSAGING

Should your messaging be updated? Write your responses below on the right.

How has consumer sentiment shifted toward your brand and competitors in the context of the crisis?

Are you driving brand awareness for share-shift or lower-funnel purchase intent?

Does the tone of your messaging align with consumer experience and stress levels during this time?

Are you facing any supply chain constraints that may require different messaging by region?

3 REALIGN YOUR MEDIA PLAN

What strategic adjustments will help you adapt to a U.S. economic restart? Write your responses below on the right.

How has your audience's media consumption changed?

Can you first test your audience and messaging insights in email or other owned media?

How has your audience distribution across TV and digital changed post Covid-19?

With the TV Upfronts evolving, are you using real-time viewership data to help evaluate a new way to invest? Are you leveraging technology to help with flexibility, strategic audiences, and ADU's?

Thank you.





AMOBEE