# Better marketing in a pandemic

The OMD UK guide

OMD

# Executive summary

We are facing an extraordinary situation without any direct precedent in modern history. To deal with a world in which the usual rules of supply and demand have been thrown into chaos, and behaviour is changing by the minute, we've built a unique marketing framework for the COVID-19 pandemic. Adjusting marketing wisdom for the present day, illustrated by live, real-world examples, our guide to Marketing in a Pandemic is intended to help our clients and stimulate our people, helping businesses make better decisions in this most tumultuous of times.

It is the first of four pieces OMD UK will publish in the coming weeks, setting the rules for action during the crisis, with the following releases helping shape our response to the post-coronavirus world, financially and behaviourally.

# Introduction

The National Bureau of Economic Research defines a recession as "a significant decline in economic activity spread across the market, lasting more than a few months, normally visible in real GDP, real income, employment, industrial production, and wholesale-retail sales."[i] The coming COVID-19 recession of 2020 will possess most of these general characteristics, initially accelerating at a bewildering speed. Yet those general characteristics obscure the unique nature of the recession and mislead business leaders into reacting as they would to any other downturn.

For this is no ordinary recession. The corona-recession will be unlike any recession in living memory, asking a different set of questions and creating an uncommon series of opportunities. To build the right marketing approach for COVID-19 we must understand how this pandemic – and our response – will create a unique set of economic and cultural conditions, change consumer behaviour in the long-term, and pose distinct challenges for individual businesses.

# Contents

# For businesses and customers alike, the COVID-19 pandemic is no ordinary recession

Like all recessions, the one we're entering will see job losses, reductions in personal earnings and expenditure, lower corporate revenues and investment, stock market losses and business failures. Unlike all other recessions, this one will be different.

## **Difference 01** This is a deep - but recoverable economic shock

Our recession isn't a market correction or the result of structural weakness. It is, as historian Adam Tooze notes, that our economy is in an "artificially induced coma."[ii] This pause, something that is likely to come with acutely negative side-effects in the short-term, is one from which recovery is possible if governments protect the most vulnerable industries, businesses and jobs through lending and subsidy. Treated properly, market contractions happen frequently and without the destructive ability of a festering depression – every August, for example, the GDP of countries like France and Italy contracts by more than 10% owing to mass holidays;[iii] in the UK, we regularly see GDP decline in both Q1 and Q2 when unadjusted for seasonal habits.[iv] Initial data from China suggests this won't be the neat "V" we all want,[vi] but as the economic pause is lifted in major Western economies people will likely see a point in 2020 at which most activity resumes.

"Our recession isn't a market correction or the result of structural weakness. It is, as historian Adam Tooze notes, that our economy is in an "artificially induced coma".

## Difference 02 Governments are taking action to protect incomes

Another difference to 2008 has been the governmental response in most industrialised countries. Perhaps shocked into action by the sheer dumb luck of redundancy by virus, even governments inherently hostile to greater debt have promised to directly subsidise wages, a step that was barely countenanced, let alone used, in the 2008 recession. With help offered to the self-employed, as well as mortgage holidays and other stabilisers, the impact will be significant at a national level but, individually, whilst spending power will decline for those unemployed (or underemployed), far fewer will be taken out of the economy entirely. This will mean cutbacks, especially for those losing hours, but it will mean people retain some discretionary income.


## Difference 03 The impact won't be evenly distributed across categories

However, unlike recessions of decades past, this economic coma isn't a "decline in activity spread across the market" but a deliberate reduction in demand in a highly specific set of economic sectors. The cutbacks people will make are likely to be guided as much by legal restriction as financial capacity: some categories will be temporarily frozen, others unaffected entirely, some even accelerated. We can see, already, this manifested in Google search interest: in what other deep recession would interest for consumer electronics be up nearly 70% year-on-year? Or FMCG up nearly 170%? Meanwhile, we see other categories in steep decline – automotive down 30%,[vii] fashion even more – and others, such as home improvement, where demand appears to be holding up.

> "...in what other deep recession would interest for consumer electronics is up nearly 70% year-on-year?"

## Difference 04 The COVID-19 recession comes with a significant lifestyle change

Most recessions stimulate new routines through the restrictions they place on people's lives. [viii] After the 2008 Financial Crisis, 72% of new shopping habits that were adopted in the period stuck. In 2020, we lack not just money but freedom, shifting almost overnight to new ways of living, working and socialising. Yet what these changes in law don't affect, however, are underlying wants and needs, which will likely lead to novel pursuits of old interests, the rapid embrace of new technology and behaviour in order to maintain a semblance of normality.

## Difference 05 Those lifestyle changes won't be evenly distributed either

The NHS is the UK's largest employer with nearly 1.5m members of staff; millions more work for critical public sector organisations, large grocery chains remain open, delivery services, in manufacturing roles, transport, at utilities, banks, other financial services companies. None of these people will be enjoying meetings via Zoom from their kitchen table. Their hours will be irregular, long and often dangerous, and their media consumption and purchase behaviour disconnected from the rest of the population. Depending on the make-up of your audience, their unique routines will further distort shifts in demand.

**Difference 06** In the eyes of our customers, this is a public health crisis first and an economic crisis second

## "...there is a social dynamic to our recession: it likely isn't, and won't, be described as a time of recession but of great public and private tragedy."

Lastly, there is a social dynamic to our recession: it likely isn't, and won't, be described as a time of recession but of great public and private tragedy. The mortal impact of COVID-19, the loved ones hospitalised and the residual anxiety for those personally healthy, means this is no ordinary financial crisis. It is about something more important than money. We are likely to see collectivist attitudes prevail in the medium-term, with everyone expected to do their part – including business.

### In Summary

Our world today isn't merely one of financial strife but a situation in which the combination of humanitarian need, government regulation and economic crisis have almost overnight readjusted the dynamics of supply and demand. Whilst we know that incomes and spending are likely to decline overall, that generalised picture obscures the uneven impact of the COVID-19 pandemic at both industrial and individual levels. During this time the best marketers will think deeply about their social contribution and prize category context and customer empathy over the blanket application of technology.

# The role for marketing during a pandemic

It's critical that marketers first recognise that they still have a role to play - and that advertising isn't something to feel uncomfortable about. The first thing to consider when making a marketing decision is the health and wellbeing of your colleagues and the public at large, but in many cases – where people remain in market now and will increasingly crave normality as the crisis continues – there is opportunity for genuine mutual benefit between your interests and the nation.

In the short-term, with customers remaining in market in many categories, marketing is there to do what it always does: offer a suitable solution to an existing problem at a moment of need, helping people enjoy what they love and save time on what they don't. In the medium- to long-term, for most brands this is an opportunity to build positive associations and enduring preference by tapping into greater social and behavioural needs at a time of intense change. If we are behaving with empathy - for our colleagues and customers – whilst speaking to genuine need, avoiding anything that could be construed as exploitative, and being sensitive to the new behavioural necessities of our world, marketing is entirely appropriate.

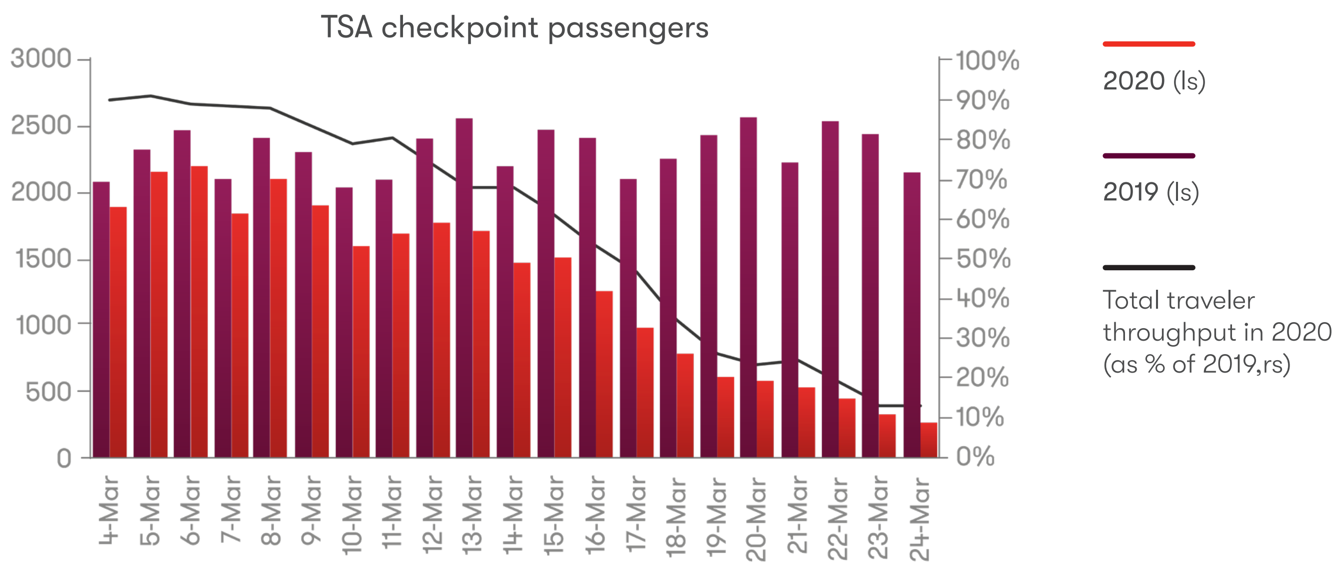
# How do we make better marketing decisions?

Whilst marketing – applied judiciously and empathetically – has a role to play for the public and business alike, the nature of our recession means that there is no one-size-fits-all solution. With some categories frozen, and out of the public consciousness, others in higher demand than ever before, and customer behaviour more volatile than ever, it's critical that marketers plot their own path. Most critically, with total addressable market being the number one factor in advertising response, it is irresponsible for agencies to recommend brands continue to invest at pre-pandemic levels if the size of that market has been temporarily reshaped.

One only needs an example of air travel to realise the old rules no longer apply. In the depths of the recession that followed the 2008 financial crisis, airlines in the UK served roughly 124m passengers[ix], a substantial drop in market size – nearly 50% smaller than the number that would fly in 2018 – but still a category enjoyed by millions. Today, there is almost no market, by government fiat, and virtually no audience. The category does not meaningfully exist, at least temporarily, and agencies that would risk "brand-building" when these brands are in stasis, their market plucked out of the everyday lives of their customers, are agencies who are leaving common sense at the door of their home office.

**Instead, to manage this process, we've built a simple three-step guide, creating a series of brand archetypes for the present, not the past, to contextualise and assist decision-making.**

## US airlines passenger traffic currently 10% of normal




Source: TSA, DB Global research

Step one | Step two | Step three

## Embrace the evidence

There is best practice about marketing in a recession that applies in this downturn as it would for any other; learning from the successes (and failures) of recessions past will put you in a stronger position when this period ends. Specifically, we can observe three critical lessons:

### To stop advertising for an extended period is a decision that should not be taken lightly

In a challenging economic climate, a marketer's impulse may be to reduce budgets or cut spend completely – yet evidence shows that this is a huge risk for long-term business performance. Often, the effect of cuts in the very short-term appears beneficial, covered as they are by the overhanging impact of previous campaigns, yet in the long-run this reduction in investment often costs more than it saves.

Two key constituent brand relationship metrics – brand usage and brand image – suffer considerably when brands go dark of six months or more. Aggregated IPA data shows that, if a brand cuts budget by half in Year 1, it will take up to three years to reach the brand metrics enjoyed in Year 0. Cuts its budgets completely and that recovery period extends to five years. The same research shows that the impact on the bottom line in both scenarios is equal to the investment saved.

Going quieter or falling silent also risks a brand being judged to be on the way down. A perception that will very rapidly be manifested by word-of-mouth, which will accelerate the perception of failure.


| | Budget saved | Sales foregone | Profit on foregone sales | Impact on bottom line | Time to recover |
|---|---|---|---|---|---|
| Zero budget year 1 | £1.8m | £8.6m | £3.5m | £1.7m | 5 years |
| Half budget year 1 | £0.9m | £4.3m | £1.7m | £0.8m | 3 years |

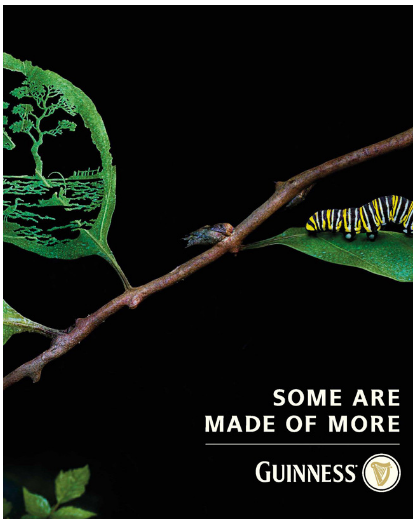
### Customer behaviour should be carefully monitored because recessions change it

During a recession, many of us will discover new priorities and advantages. The evidence suggests many will maintain these new behaviours adopted in recession into their longer-term lives. After the 2008 recession, 72% of consumers admitted to practising more savvy shopping behaviours even after the climate had improved, whilst social behaviours and purchasing patterns learned in the crisis stuck. British social behaviour around alcohol, for example, experienced a huge change during the 2008 recession – people stopped drinking in pubs to save money, shifting their socialising into the home, and liked it so much they never went back to the pubs even when incomes grew. Marketers need to track consumer behaviours in a recession.

### Your creativity should increase, not decrease

For several brands, dealing with the challenges of a recession led to highly effective long-term ideas. All the IPA's 2016 effectiveness award cases were developed in an uncertain economic climate, many with declining spend. But long-term thinking has helped these brands thrive. Notable examples include:

**Guinness**

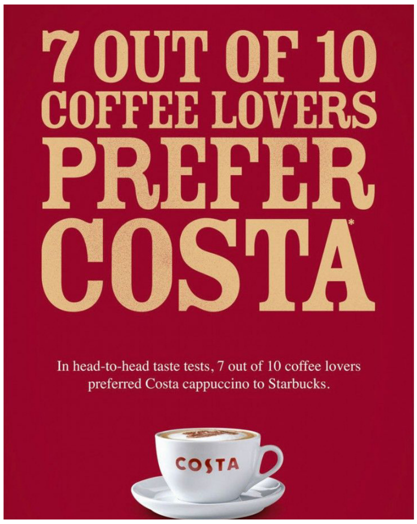



Guinness beer's commitment to a new idea - 'Made of More' proved 2.3 times more effective than the preceding advertising

**Macmillan**


The Macmillan charity's commitment to its 'No one should face cancer alone' campaign generated unprecedented 49% revenue growth - four times the average for major UK charities

**Costa**




Costa Coffee's mission to save the world from mediocre coffee - building long-term brand values as it did so propelled Costa to sustained brand leadership in the UK

If budgets must be cut, then a stronger creative approach can compensate for this. More memorable creative can maintain or increase ad awareness levels, even with a lower budget. A Millward Brown analysis shows that brands increasing share of awareness are more likely to gain share, even if share of voice declines.

## In conclusion

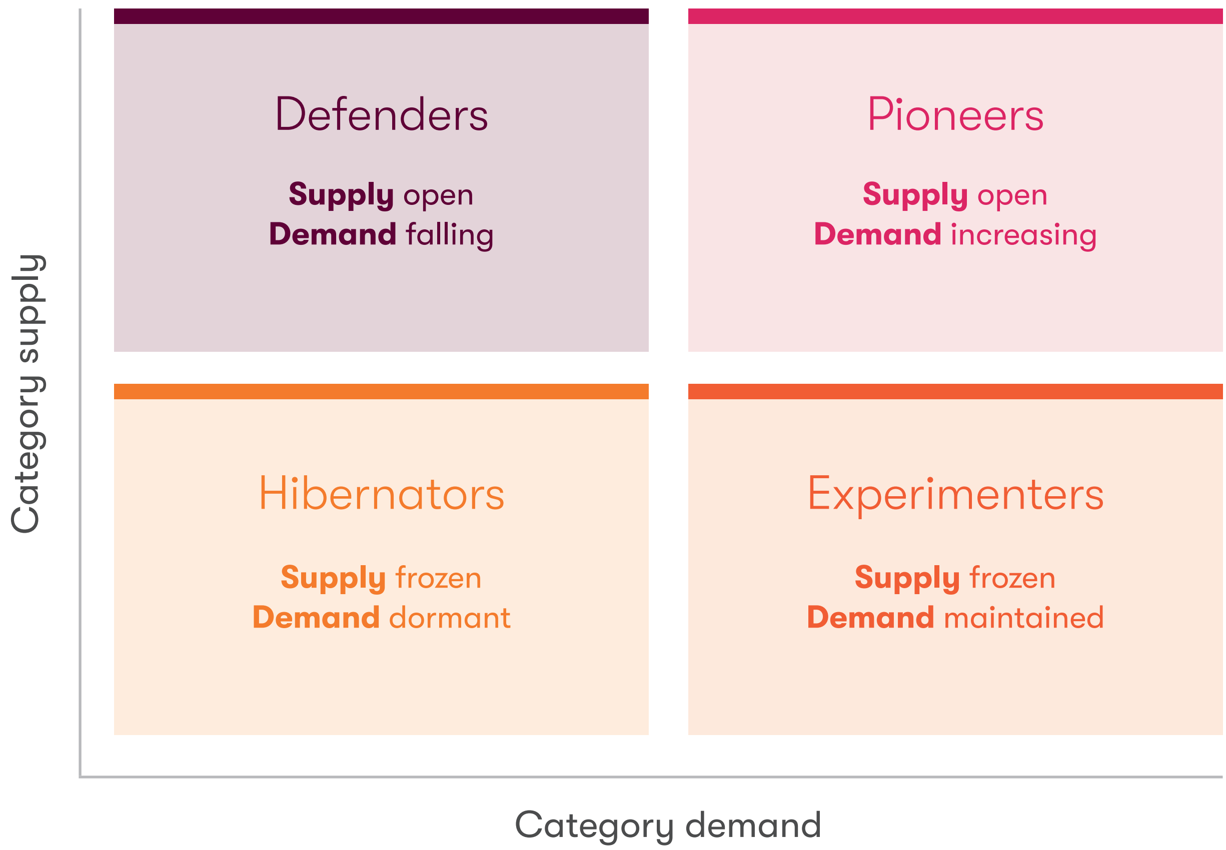
Marketers should think hard before reducing investment or drastically changing brand behaviour. A temporary pause will be sensible for many – after all, most brands will go 2-3 months without advertising every year – but persistent silence risks creating a financial spiral from which it is difficult to extricate your brand from. To maximise lasting impact, they should prioritise creativity when they do invest, and track changing behaviour throughout.

However, that evidence base does not recognise the disruption and unevenness we currently see today. It is here we recommend you consider your own category and customer context rather than lean on generalised examples.

## Recognise your reality

Reality today looks very different if you're the CMO of a travel brand or a grocer, an automotive brand or a food delivery service. Government restrictions on life outside of the home, plus the technology that has emerged since our last recession – which came at a time most of us were using Blackberries, not iPhones – has dramatically reshaped both demand and supply of individual categories, with customers adjusting on the fly.

**Brands in a pandemic: The OMD archetypes**




This combination of high restriction, existing routine and new technology means that there is no single right or wrong answer. You need to assess what good marketing looks like given your specific context. Some brands might be having success with live-streaming, for example, but that does not necessarily mean that you should immediately ditch your reassuring brand TV campaign. What is right for easyJet is unlikely to be right for Uber, which is in turn unlikely to be right for Barclays or John Lewis.

That context, we believe, is dictated largely by: the extent to which your supply is restricted by the government, and the extent to which your customer demand is maintained through straitened times. Using these two variables we can create four categories: Hibernators, brands whose supply and demand are both frozen; Experimenters, those whose supply is frozen but whose demand remains; Defenders, where supply is open but demand has declined; and Pioneers, where supply is open and demand is accelerating.

| Hibernators | Experimenters | Defenders | Pioneers |
|---|---|---|---|
| Brands whose supply and demand are both frozen | Those whose supply is frozen but whose demand remains | Where supply is open but demand has declined | Where supply is open and demand is accelerating |

Where you fit should inform your marketing priorities:

**Hibernators**

Category

A

## | Characteristics

- **Supply -** frozen by government policy, existing entirely in the physical world outside of the home
- **Demand -** low, regardless of restriction, with your product ill-suited to people's new behavioural routines
- **Likely categories -** airlines, hotels, automotive, transport, some hospitality businesses

## Behavioural properties

For those whose business is currently paused we recommend a temporary pause in advertising investment, despite the generalised evidence. In the immediate term, whilst lockdown restrictions continue, people's interest in your business is momentarily on hold. That lack of motive – means that building positive long-term associations through advertising is unlikely, even if all short-term goals are forgotten. However, be careful with that pause. Not only will people's interests inevitably drift to life beyond lockdown as it continues, increasing that category interest, an extended break leaves your business highly vulnerable.

Instead, you need to wait for the moment an endpoint becomes clear, with the prospect of normality likely to lead to an upsurge in interest as people think optimistically about the future. Holidays will be planned, family visits scheduled, days out cherished. You will have leading indicators that provide a sense of when this optimism has begun to set-in, particularly for bigger purchases with a longer purchase-cycle, such as housing. Invest ahead of the moment that distancing regulations are lifted, to build the salience and share of voice needed for when they are. For shorter-term purchases, bought more on spontaneity, your return is likely to be best timed with the lifting of behavioural restrictions.

Whilst you are in hibernation, however, it is important to keep your existing core audiences warm. These are likely the minority that use your product as an extension of passion and identity, the people who can't do without it – car-lovers, for example – and will likely retain some interest in the category. It's critical to use direct channels to maintain good relations with this critical group. Invest in CRM, social and other 1-to-1 media.

Ahead of your re-emergence into public life, it is critical to keep track of two things. First, most obviously, is the emergence of a consensus date at which behavioural restrictions will be relaxed. Second, however, is more empathetic: as people return to your categories, they will likely return with new behaviours. Be prepared to quickly reorient your marketing to fit the preferences generated in lockdown.

However, that return should be carefully judged. This is, above all, a human tragedy, and the return of your brand after a time away cannot be too triumphalist or positive. Marketing should seek to mirror the return of people and categories back into normal routine, positioning your product as, again, part of their everyday life as regulations are eased. Build bottom up from basic triggers and need-states.

## Examples

During the SARS epidemic of 2003, FMCG sales growth in APAC dropped from 16% to 10-12% year on year and remained low for the two critical months of the epidemic. After the epidemic finished, sales exploded as shoppers compensated for the purchases they had otherwise delayed.[x]

After the 2008 Financial Crisis, luxury fashion sales globally declined by 9% and high-end department stores lost 25% of their sales in 2009 alone. The category rebounded by dramatically reorienting to emerging demand in China and by courting new shoppers through the embrace of streetwear. However, the mis-steps during the crisis – when prices were slashed to maintain sales volume – has permanently hobbled some sectors of the category.[xi]

### Key questions

**Which emerging behaviours have the power to reshape our category once it reopens?**

**What is the likely “ramp” of demand in our category as we return to normal?**

**When do we believe our category will be reopened and at what point will people begin to plan their purchase?**

**What is the right tone to adopt upon our return given the significant human toll in our absence?**

**What might be useful to our core fans in the absence of any sales opportunity?**

**Experimenters**

Category

B

## | Characteristics

**Supply -** frozen by government policy, existing traditionally outside of the home

**Demand -** high, with your product well-suited to a world hungry for entertainment, utility and occasional indulgence

**Likely categories -** hospitality and leisure brands such as restaurants, gyms, cafes, cinemas, museums, and sports

## Behavioural properties

With revenue compromised, heavy media spend is difficult to justify, but given demand remains high it's important to bring your benefit to people when they need it. By retaining a role in people's lives even whilst your category is highly restricted, you offer your brand the best chance of success when restrictions are removed and revenue flows.

In a world where smartphone penetration, mobile internet and fast broadband is widespread, brands in this category should be thinking technology first. How can you create a virtual version of the mostly physical product experience people used to enjoy? How can you simulate the benefit remotely, using streaming, social and delivery technology to maintain the role you used to enjoy out of the home, inside of it? Spend money on "minimum viable products" that seek to replicate these benefits and extend them to previous users, fast.

To achieve the right sort of simulation it is first critical to identify the why, where and when of your traditional product offering. Your mission should be to retain a presence in the right moments, aiming for the minimum salience possible amongst the core audience at the most relevant moment, and then building a new approach to allow access in that moment through new technology. Given the reliance on potentially untested technology, brands should retain an experimental mindset, allowing for the possibility of failure in their attempts to service customer need. The emphasis should be on quick, low-cost attempts at new business models, leaning on existing brand equity and proposition, not attempting to reinvent the fundamentals of brand identity and behaviour.

This activity is unlikely to fully compensate lost revenue, but it could open your business up to new audiences and/or maintain brand salience over time – both of which are critical to long-term success. It is therefore worth experimenting not simply with access but also pricing, using lower prices – even free trials – to expand access.

## Examples

| In the recession of 1973-75, with investors retreating from equity markets, Charles Schwab launched discounted commissions on trading whilst Vanguard started promoting index funds.[xii]

More recently, Sky Sports and Formula 1 replaced the cancelled Bahrain Grand Prix with a virtual race participated in by real drivers. This was screened globally before on Twitch as well as the Sky Sports F1 channel to an audience of hundreds of thousands.[xiii] NASCAR did the same with FS1, garnering nearly a million viewers for their first simulation.[xiv]

Recognising the continued hunger for sport more broadly, The Athletic has experimented with removing its paywall and covering sport events from yesteryear.[xv] Cricinfo has started to cover old cricket matches, such as the 1992 World Cup Final, as if they were happening live.[xvi] The Guardian[xvii] and Four Four Two[xviii] have created "as live" recaps and discussions of classic games.

Restaurant supplier Natoora has pivoted from B2B to B2C, opening up their app – and their treasure-trove of hard-to-find ingredients – from a trade exclusive to a consumer delivery,[xix] and were quickly overwhelmed with new customers looking to reproduce their restaurant favourites at home[xx].

The popularity of video chat has sky-rocketed as people seek to replace their in-person interactions. Zoom, Houseparty and FaceTime are experiencing rapid growth in usage. Musicians have shifted their presence online in the absence of gigs, live-streaming to fans or even hosting music lessons[xxii].

Celebrities are trying to carve out roles that replace school lessons for kids trapped at home. Joe Wicks is doing PE lessons to millions[xxiii], David Walliams is doing storytime[xxiv] and Chris Packham is live-streaming bird-watching from the New Forest[xxv].

Movie studios are releasing movies early for rent and purchase, well in-advance of usual release dates. Emma and The Invisible Man are amongst the high-profile titles now available[xxvi], with more likely to come.

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**Key questions**

**What are the benefits of your category – and needs of your customers – that endure regardless of access?**

**What capabilities - tangible or intangible – do we still possess to serve those needs?**

**What is the "just good enough" version of our established products we can still provide remotely?**

**What partners could we work with to re-establish a role inside a moment we're relevant to?**

**What is the pricing strategy we can use to broaden out our offering to new or lapsed audiences?**

**Defenders**

Category

C

## Characteristics

**Supply -** unfrozen, accessible within government guidelines outside of the home, or through ecommerce

**Demand -** likely lower than average, with spending in decline owing to economic crisis or priorities elsewhere

**Likely categories -** general retail, fashion, toys, white goods, electricals, some FMCGs such as toiletries, some financial services brands

## Behavioural properties

With revenue broadly holding up – albeit at likely lower levels in most categories because of the decline in consumer spending – it's important to maintain your salience and use marketing to provide a competitive edge. Here brands are recommended to stick closest to traditional advice, looking to defend market share amongst those entering the category and protecting future revenue.

To accomplish this, successful brands will lean on the tried and trusted[xxvii] as consumers seek sanctuary. Messaging should feel familiar, products featured should be well loved, behaviours, tactics and cues well established. Do everything possible to reduce cognitive load, ensuring your brand remains one of the defaults in your market, reaching as many category customers as possible. New products should be side-lined – you should be defending share of spend, not encouraging incrementality – and niche audiences should be avoided. Reassurance, safety and confidence should be your primary implications.

In media, aim for efficiency to set-off falling revenue. Choose shorter spot-lengths, and chop out under-performing channels. Prioritise spending money where the broadest audiences are – today that is TV, online, social, radio and print – and maximise your reach when (and where) competitors are spending less or pulling away from marketing. Be consistent in your visibility and, if you've deeper pockets than your competitors, prioritise patience, allowing them to burn money on momentary flashes of attention.

There is no need to over-complicate or over-think. People – despite their emotional state – will retain basic everyday needs that your brand should fulfil. If you have nothing to sell other than shampoo and nothing to talk about other than clean hair, keep talking about clean hair. Brand advertising often succeeds when it plays into basic motivations[xxviii], and as a result, unless you have an idea outside of those motivations that is so singularly entertaining or inspiring or valuable it will transcend any sense of short-term category need, business as usual might be a decent goal.

## Examples

In the Great Depression, Kellogg's doubled its ad-spend and tripled its profits, become the category leader – where it remains – and overtook the erstwhile number one, Post.

In the 1990-91 recession, McDonald's stopped advertising and failed to defend their share from Pizza Hut, who kept investing and grew sales 61%[xxix].

Throughout the economic turmoil of early 90s Britain, Barclaycard stuck to its well-liked creative approach, kept investing, and quickly overtook competitors fearful of investing in a recession.[xxx]

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**Key questions**

**How are people spending in your category and what do they need from brands like yours?**

**How are competitors responding and how can your marketing better services those needs?**

**What could you do to reinforce positive, familiar associations at a time of huge anxiety?**

**What can you do to make communications more cost-efficient, without sacrificing its effectiveness?**

**Where are the most important moments to continue showing up in people's lives?**

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**Pioneers**

Category

D

## Characteristics

Supply - unfrozen, accessible within government guidelines outside of the home, or through ecommerce

Demand - likely growing as a result of the behavioural restrictions elsewhere

Likely categories - media brands, food delivery, ecommerce, gaming, grocery, social platforms, some FMCGs such as food & drink, some financial services brands

## Behavioural properties

With revenue streams likely expanding and more of people's time accounted for by your business, it is critical to use this period to drive brand preference and emerge as people's default choice.

Successful brands in this category will recognise new shoppers entering the market with more excitement than knowledge. Your products will be used in new ways by inexperienced consumers, and marketing needs to go on that journey with them, assuming an inclusive tone. This should be the case in established categories such as grocery, where the same people will be shopping to compensate for the eating out they can no longer do, with greater emphasis on scratch cooking probable. The same is true for media where people will be returning to your platforms having lapsed out, as well as investigating newer ones like food delivery.

Paid advertising should focus on breadth and budgets should be increased ahead of market share, with the object of taking higher share in a category likely to keep growing even when social restrictions are relax. Advertising tactics should reflect the newness of your product in the eyes of many customers – aim for larger, more premium formats, more expensive channels, exclusive partners, signalling your reliability and suitability. With increased usage likely without advertising intervention, brands should focus on emotional engagement and the building of strong, salient associations.

Owned media should be adapted to account for the rush of new customers, they need more basic guidance than core customers would have constituted your base less than a month ago. Equally, helping to normalise choice in brand behaviour and experience – reflecting the breadth of usage amongst existing customers – will help people feel more comfortable with your brand over the competition. Partners can help you bridge into new audiences.

## Examples

In the US recession of 1973-75, Toyota sales were benefitting from a stronger appetite for small cars. Rather than cutback, it stuck to its plan, maintained an aggressive approach to sales and marketing, and by 1976 had become the number 1 foreign car brand in the US.[xxxi]

In 2009, in the depths of the downturn brought on by the Financial Crisis of 2008, Amazon kept innovating, launching the Kindle globally.  That Christmas, for the first time, more eBooks were sold than printed books[xxxii]. Today it is responding to the pandemic by strengthening its delivery service with extra recruits[xxxiii] and planning to distribute new COVID-19 test kits to millions of UK homes.[xxxiv]

Today, Uber Eats is pioneering food delivery, with financial assistance to struggling restaurants and key workers alike, offering promotional spend to both whilst reducing up-front costs and restructuring payment terms for suppliers.[xxxv]

Twitch, the market-leading video game-streaming platform, is adding features and functions at pace to broaden its user base whilst streaming grows in popularity. By fast-tracking an affiliate programme, it has broadened its role into a general streaming space, turning itself into a popular music-streaming platform[xxxvi], allowing musicians to generate revenue from their live performances. Subsequently it has hosted album streaming parties from Nicolas Jaar[xxxvii], Arca[xxxviii], a 36-hour festival hosted by Peter Bjorn & John[xxxix] and a music marathon by the music events platform, Bandsintown[xl].

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**Key questions**

**Who are the new people coming into your market right now and what is the difference in their knowledge, expectation and behaviour? Do they need something different to your core customer base?**

**Who are the critical competitors you're now facing as your market grows and your use-case broadens?**

**What are the key strengths and values of your brand that must be maintained regardless of audience?**

**What are the brand behaviours you need to adopt to establish yourself as a category leader?**

**How can you assume a more positive, valued role for customers and generate genuine fame?**

## In conclusion

Your brand will likely resemble one of these archetypes and your behaviour during the period should reflect that reality. However, reality – and the nature of modern business – is often messier than four boxes allow, so this framework should be used as a tool rather than a solution. First, if you are a portfolio business, you may have brands that sit across this spectrum. Second, even as a single brand, your position might change if government regulations tighten, or consumer interest fluctuates: we might, for example, anticipate an increased in interest in home furnishings – after the prolonged period people have been inside their homes. And third, it might be that based on audience make-up your brand is effectively in different positions on this spectrum for different audience segments: a bank might be a Defender for most but, for others, unable to access their services as normal, an Experimenter. Behaviour should move with audiences and the reality of supply and demand.

However, whilst a better marketing effort would account for this context, the very best will also account for the emotional needs of the nation.

## Consider your contribution

> "Your contribution – whatever it is – should build on your role in people's lives, where you are already trusted to provide something of quality, and harness expertise inside your business."

The current crisis, it should be remembered, is an economic emergency created by a public health disaster. People across the UK – and the world – will be losing loved ones and left anxious about their own health for months.

With more than five hundred thousand people having responded to the British government's call for volunteers to help the NHS – it is clear that, for many, the current situation is as much a collective challenge as an individual danger. As marketers, setting aside any questions of personal morality, it is right that we question how our businesses and brands can play a role. First, without a healthy, happy and financially resilient population, we have no one to sell to. Second, to sell we must be trusted – to fulfil our promises, to provide a good outcome, to play a positive role – and opportunities to reinforce trust are vital. Third, brand associations linger long in the memory, and anything that we can do to shape them for the better is to be pursued with tenacity.

However, that does not mean that every business should be asking whether they can convert their factory to make hand sanitiser. Your contribution – whatever it is – should build on your role in people's lives, and harness expertise inside your business. Attempting to contribute too far from your area of relevance risks being seen as opportunistic, and increases the possibility of an underwhelming experience. You should relentlessly inspect any suggested contribution to the social effort against COVID-19 from the perspective of the public, looking for holes, flaws or potential misunderstandings; prioritise where your known role matches with the new needs that people might have.

Do it well and the benefits are truly mutual. After Hurricane Katrina, P&G's Tide detergent created mobile laundry services for flood victims,[xli] assisting with the basics of everyday life whilst underlining their position as America's category leader.

More recently, LVMH's conversion of its perfume factories to make hand-gel[xlii] helped the French health service whilst reinforcing its status as a national treasure. In the US, Ford, GE Healthcare and 3M[xliii] are all building medical equipment, helping those in need whilst reinforcing their positions as enduring American innovators. It is the right thing to do, and it will be remembered, but choose badly and that too will be remembered – for the wrong reasons.

Of course, if you do not possess this relevant expertise but you do have the desire – and the funding – to help, then now is the time to look for partners. Rather than opportunistically pursue your own solution, find those that can do it better and use your marketing prowess, your business scale and your individual passion to help them. Commit to raising funds for them, share your assets with them, your customer databases, ambassadors, and your staff.

Customers will reward you for your maturity and your contribution.

> "After Hurricane Katrina, P&G's Tide detergent created mobile laundry services for flood victims, assisting with the basics of everyday life whilst underlining their position as America's category leader."

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**Key questions**

**What tangible capabilities do you have to assist real problems during this crisis?**

**To what extent will – or can – the application of that expertise chime with our enduring role in people's lives?**

**How will our attempt at help – and the framing of it – be understood by our audience?**

**If you have the means but have no relevant expertise – where can you partner to make a difference?**

# Conclusion

The COVID-19 crisis is no ordinary recession. As a public health emergency, its effects are damaging to the economy but that damage is manifested in a chaotic and uneven impact to supply and demand by category. By following the OMD UK framework, built to reflect those unique supply and demand dynamics of this crisis, you can make better decisions for you and your business. And you can make those better decisions whilst contributing to the world around you, safeguarding the future of your audience and your brand whilst you're at it.

**Coming next**

This guide is the first of four releases that OMD UK will be delivering for its clients and its people.

With this document establishing better behaviours during the crisis, our next releases will help prepare clients for what comes next:

1. Planning for Recovery: What it looks like and what it requires of us
2. Understanding New Behaviour: How things have changed during the pandemic and what will stick
3. Mapping the Media Landscape: Our expectations for H2 2020 and the opportunities it will offer

# Appendix

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