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DECODING COVID-19

Observations, implications & possible actions
Greece 3.0

Athens, April 6th, 2020

Crisis

Wéijī

危机

Danger Opportunity

"Each of us can work to change a small portion of events, and in total those acts will be written in the history of this generation"

Robert Kennedy

This is the Real Thing Now

As the COVID -19 is accelerating impact all over the world, we are realizing that this is a reality that we need to go through and will take time.

Along with the media environment monitoring and brands activation observation, we initiated an exclusive weekly tracking of major social attitudes & behavioural changes, in order to identify actionable insights.

*We would like to express a big **"thank you"** to the **MRB** Team that has joined us in this journey.*

Where we stand today?

COVID-19
OUTBREAK

COVID-19
THE NEW NORMAL

COVID-19
STEPPING INTO RECOVERY OPEN

COVID-19
THE NEW WORLD POST RECOVERY

QUARANTINE PREPARATION

People get worried about basic needs with a stockpiling effect of food and health-safety products

QUARANTINE LIVING

People confined to their homes are adapting to the new situation changing behaviours, consumption and media choices. New trend arises to cope with the New Normal

EPIDEMIC IS OVER

People recover but are still cautious. Safety is still an issue and will linger as part of our lifestyle after a long social distancing

FACING THE "NEW"

There is no true "going back". Habits of the new normal create NEW expectations. Quality assurance, transparency and speed are mandatory

Source: Dentsu

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At every phase, we…

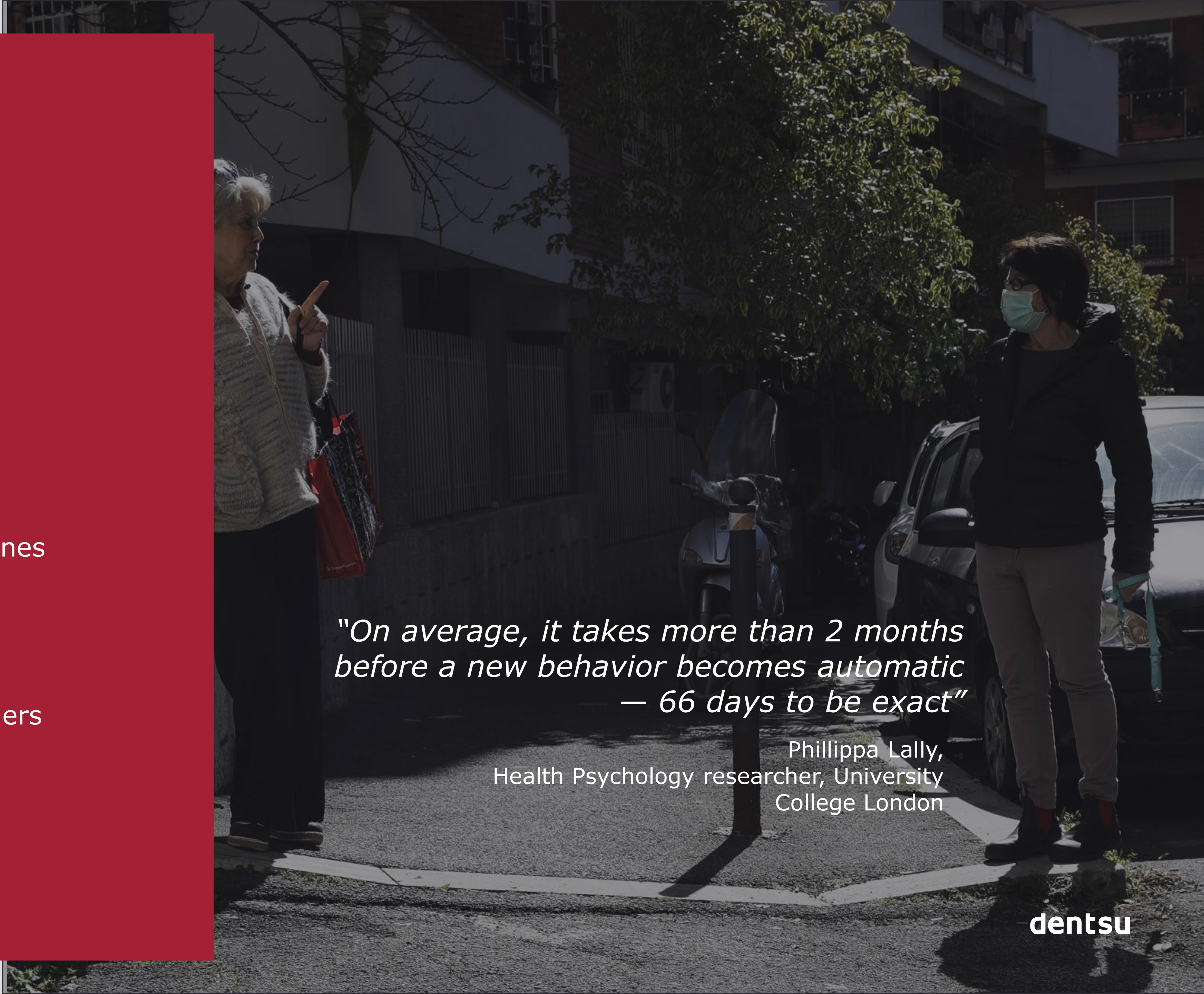
A ssembling critical information & content they need

D iscovering new connections and nurturing their relationships

A djusting to changes in their routines

P raising their everyday heroes

T aking care of themselves and others



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Tracking study | COVID-19 | 1st wave

April 2020

Contacted on behalf of Dentsu Aegis Network Hellas by MRB Hellas

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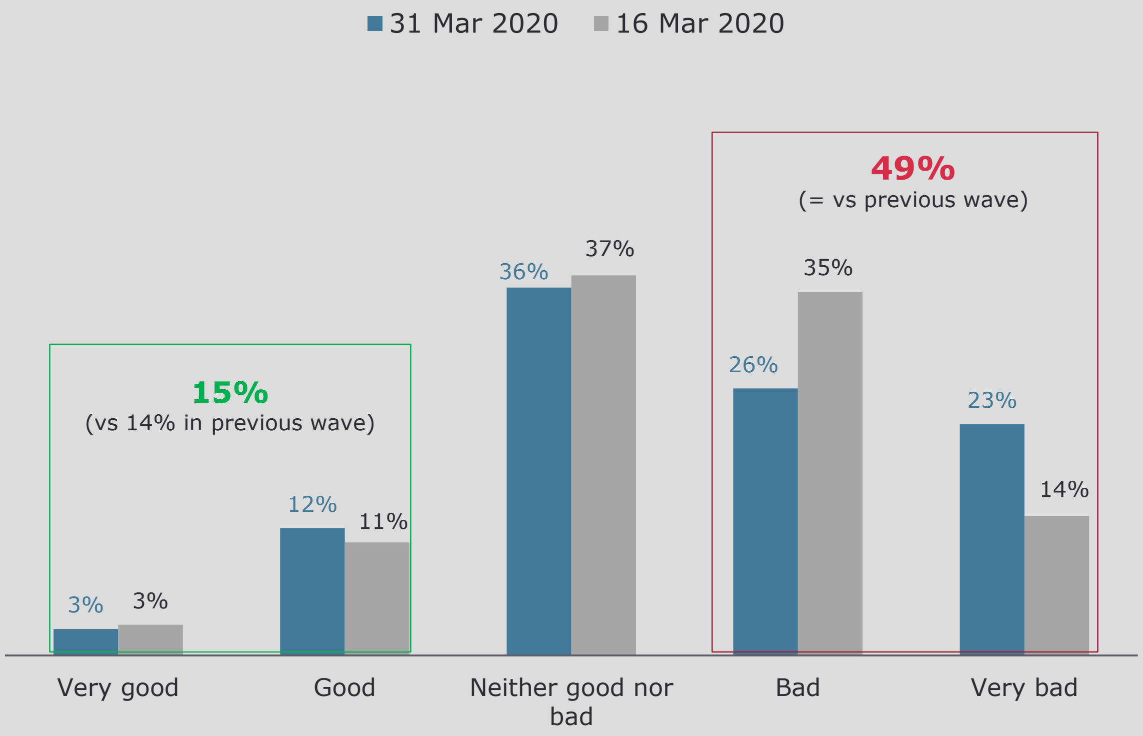
Population: Adults, 18-64 y.o., Total Greece

Sample: 500 individuals per wave

CAWI methodology

How Greece is adapting…

Outbreak upheaval calms down, still leaving people with a grim perspective



What is your opinion about how things are getting on in our country generally?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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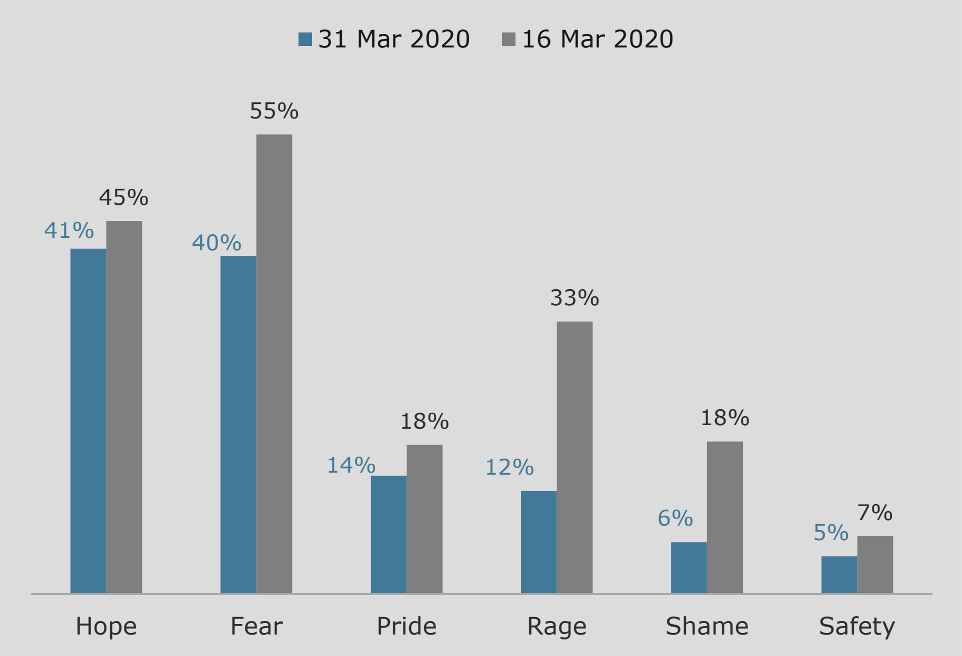
Fear from the shock is transforming to fear for the future



Which two words best describe your personal feeling about the present and future of the country?

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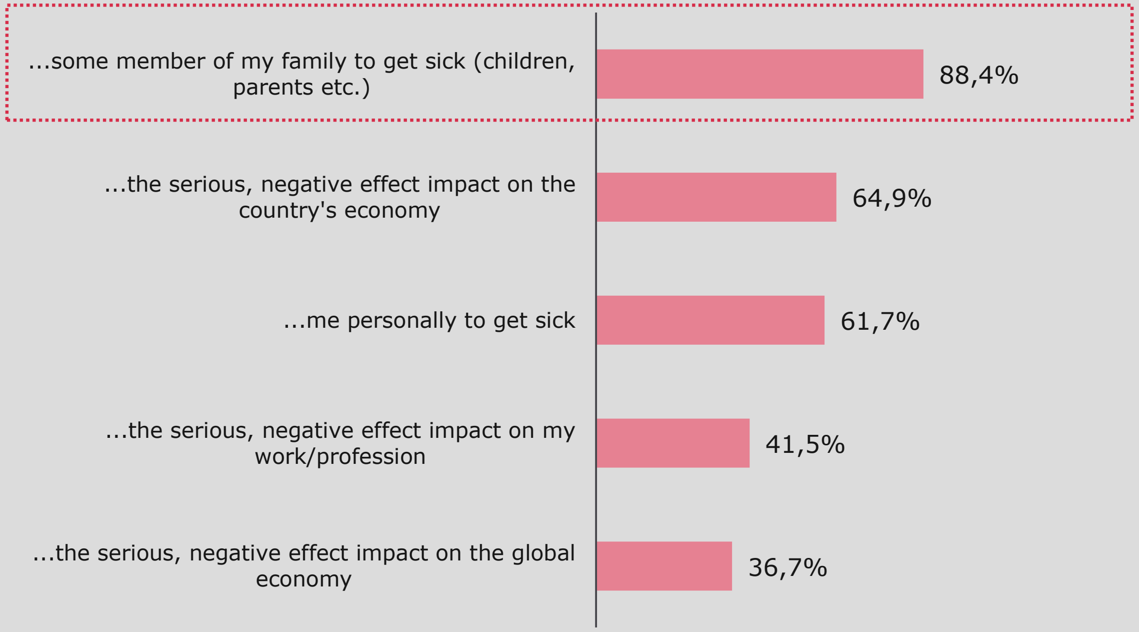
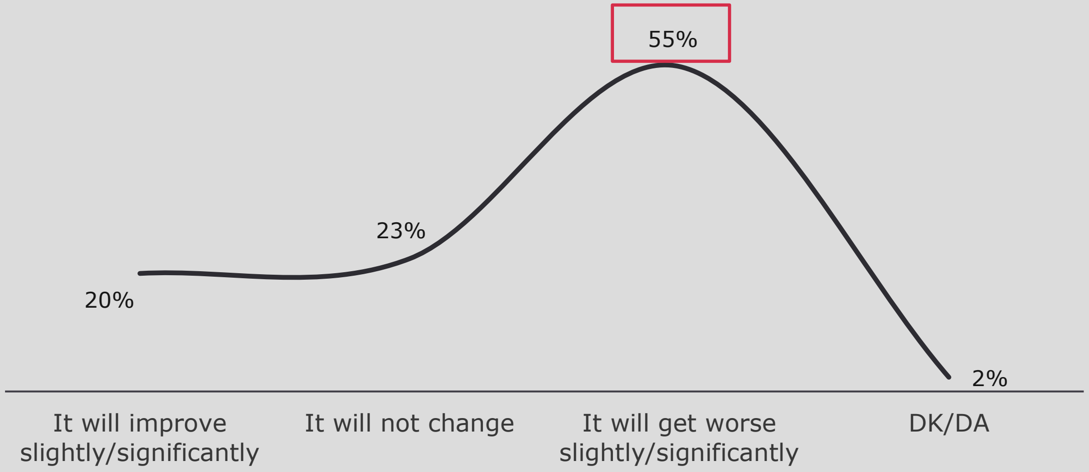
Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

Pandemic fuels fear for the health of loved ones while first signs of economic uncertainty appears



What you are mostly worried about Coronavirus?

Overall…



Considering your personal finance in the next 12 months, would you say that…

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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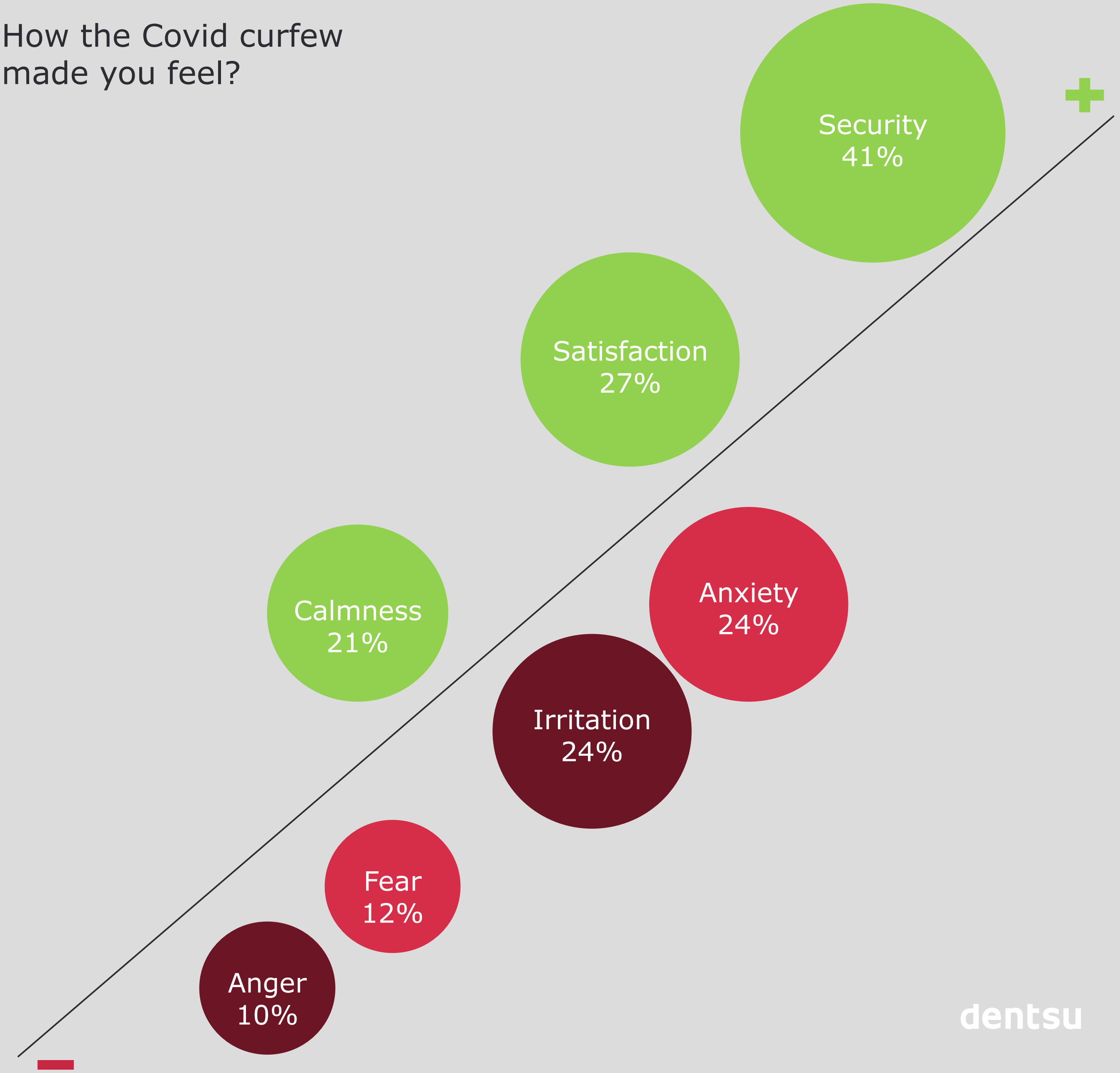
Amidst Pandemic, the need to be safe is an imperative

When the state imposed lockdown, instead of experiencing negative feelings, 7 out of 10 people felt security and satisfaction.

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

How the Covid curfew made you feel?



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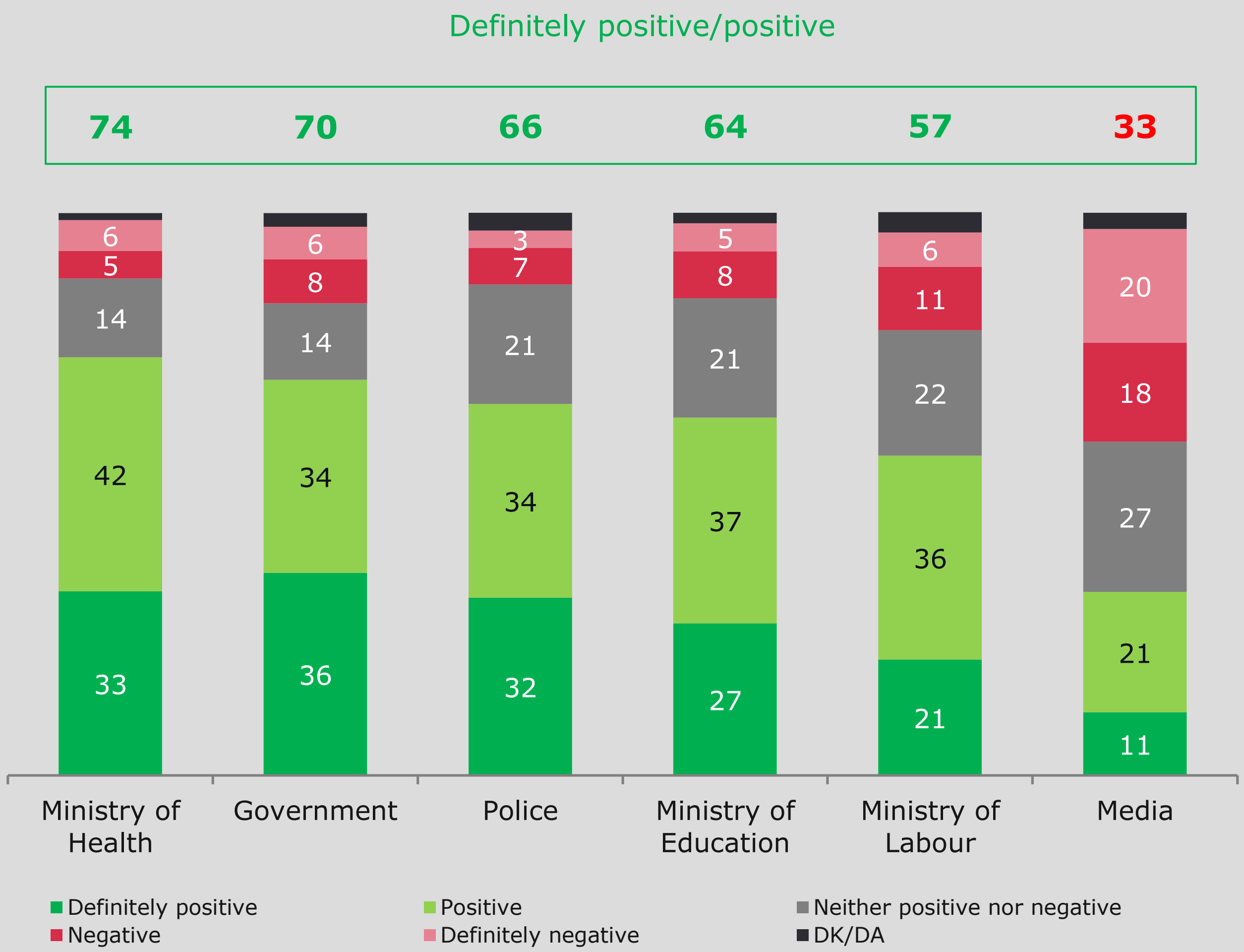
What has changed so far?

Institutions are in test

The turn towards Institutions is helping people cope with this turmoil.

Governmental authorities have won people's trust while Media have not yet "unlocked" their expectations.



How do you consider the below sectors' management of the Covid-19 emergency?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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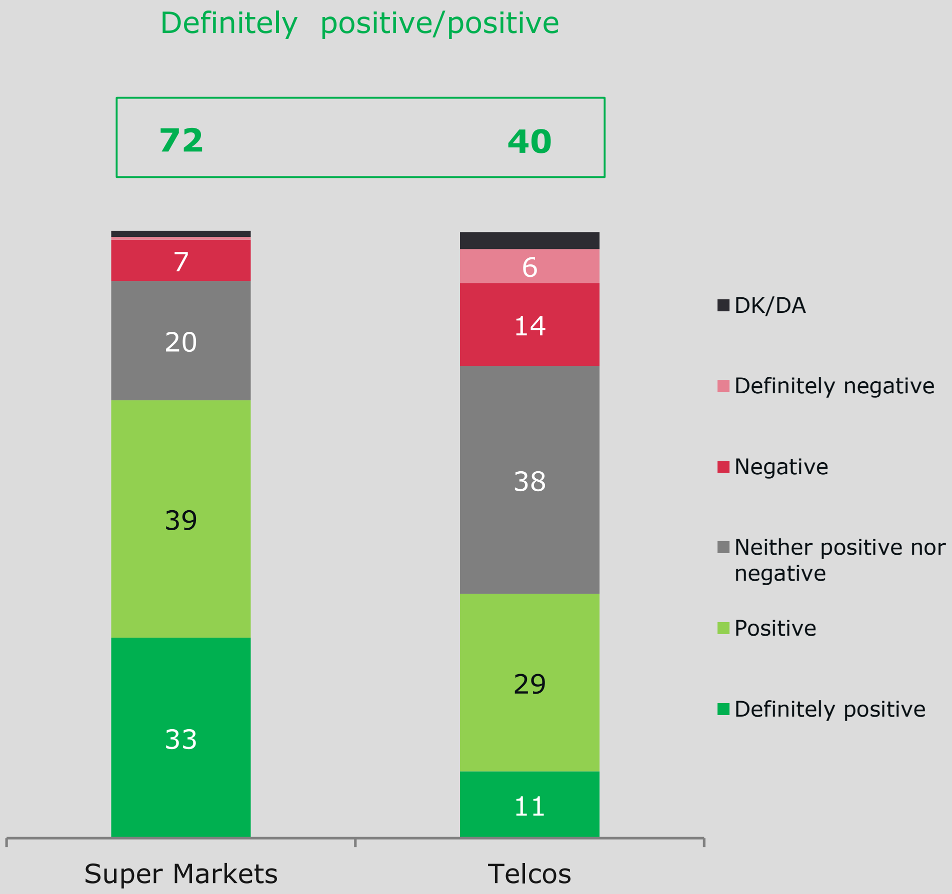
While expectations spread also to other critical sectors



How do you consider the below sectors’ management of the Covid-19 emergency?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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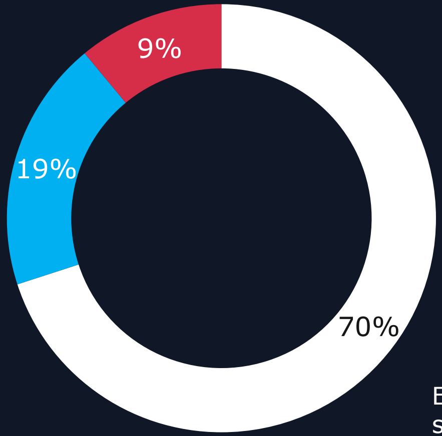
Shopping attitude slowly shifting

shop exclusively or most of the times online

shop equally online & in physical store



shop exclusively or most of the times at physical stores

Exclusive physical store shopping skews towards **Baby Boomers**!

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

#stayathome increased 30% online purchases - Millennials lead the pace

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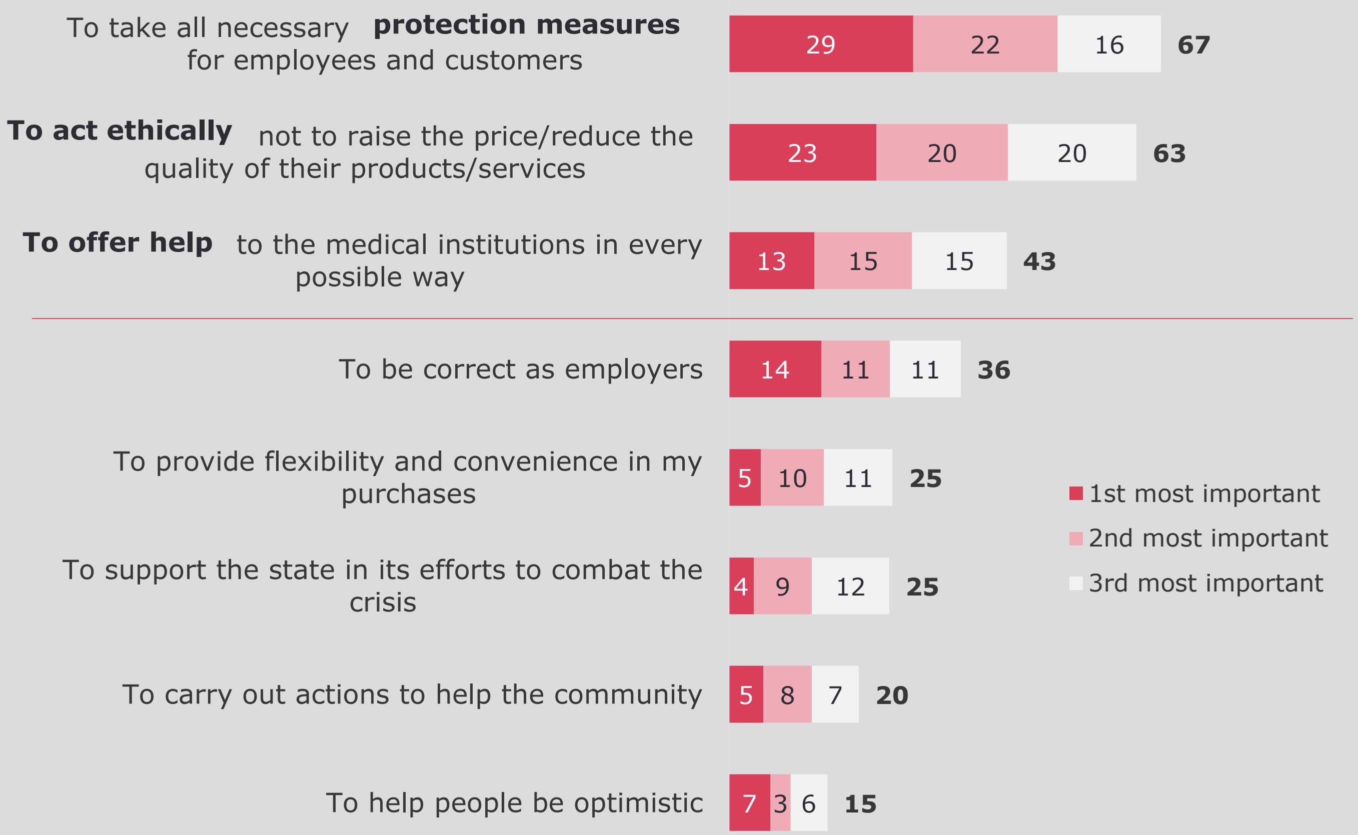
People looking at Brands

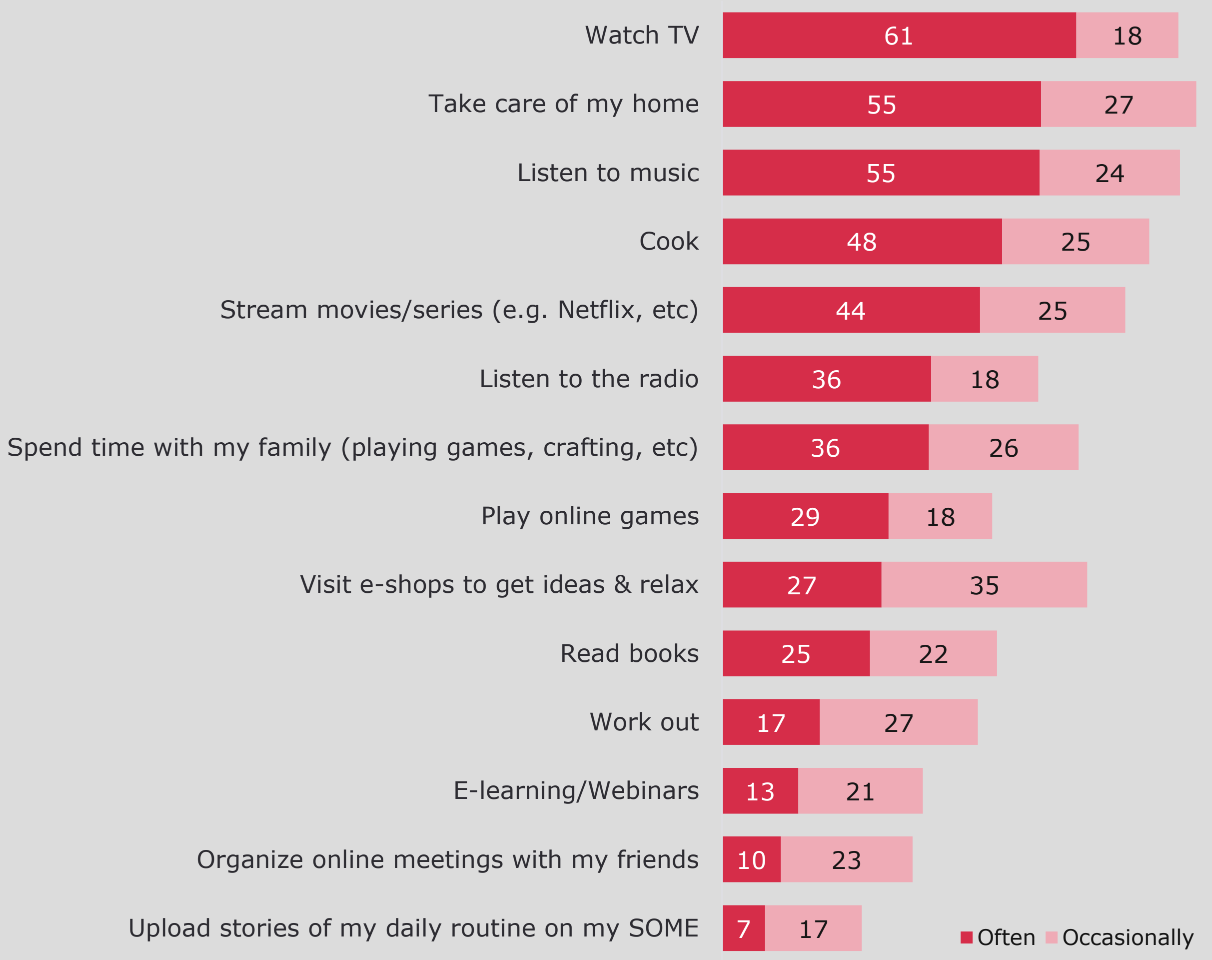
…to be purposeful & ethical



What do you expect from the brands you buy, on a personal level and generally ?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

People are adapting to the New Normal by finding new ways to enrich life@home



Staying home, which of the following do you do **often or occasionally** to feel better, relax and unwind?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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Each generation picking up from where it all stopped...

Generation Z
(17-24 y.o.)

E-learning/Webinars	(28%)	210
Organize online meetings with my friends	(17%)	172
Read books	(31%)	121
Stream movies/series (e.g. Netflix, etc)	(53%)	120
Listen to music	(65%)	119
Play online games	(34%)	118

Millennials
(25-34 y.o.)

Upload stories of my daily routine on my SOME	(14%)	193
Organize online meetings with my friends	(17%)	163
Visit e-shops to get ideas & relax	(39%)	141
E-learning/Webinars	(18%)	138
Work out	(22%)	131

Generation X
(35-54 y.o.)

Listen to the radio	(44%)	123
Watch TV	(72%)	118
Take care of my home	(61%)	111
Cook	(52%)	110
Play online games	(31%)	110

Baby Boomers
(55+ y.o.)

Read books	(32%)	127
Cook	(61%)	127
Take care of my home	(68%)	123
Spend time with my family (playing games, crafting, etc)	(42%)	119
Watch TV	(70%)	115
Listen to the radio	(41%)	115

Top activities done **often** to feel better, relax and unwind (ranked by affinity >110) / Values in parentheses refer to volume

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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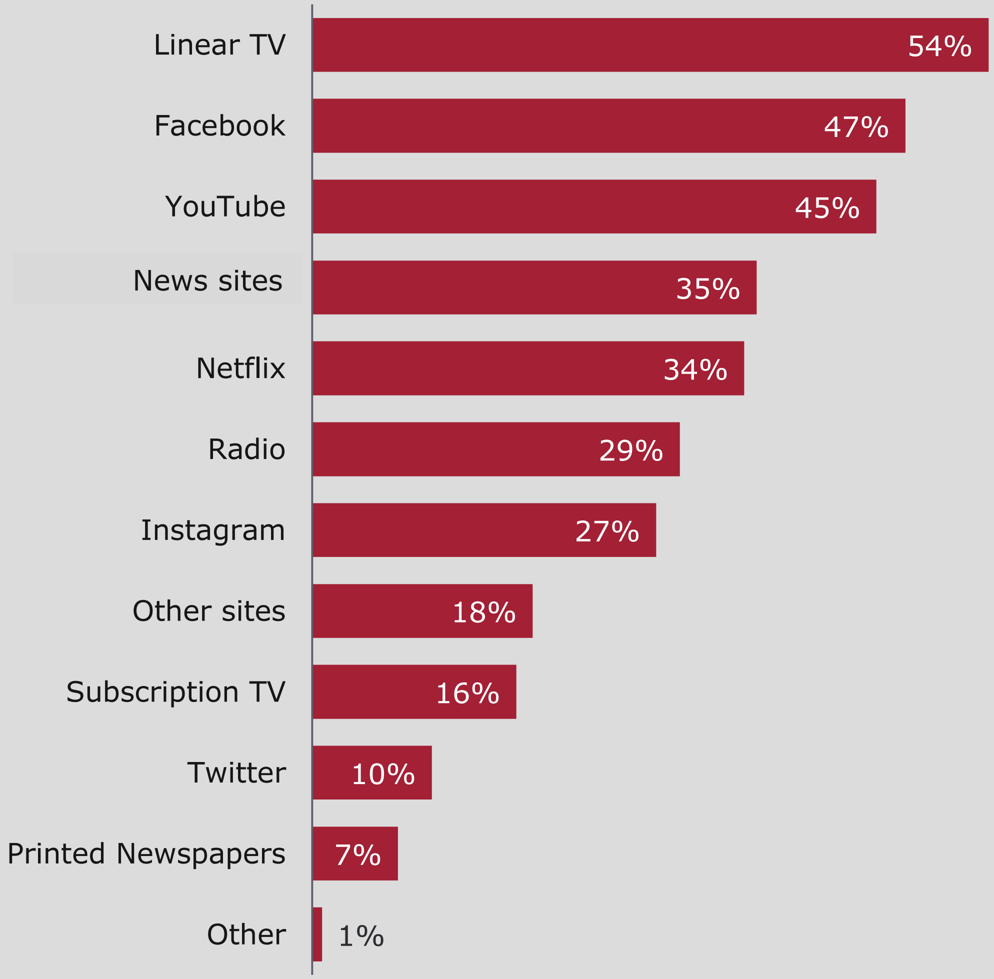
New Normal generated an increased media consumption.



Compared to the pre-Coronavirus period, what would you say are the Media you are consuming **more**?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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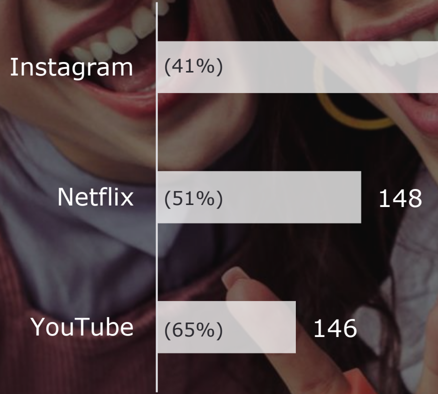
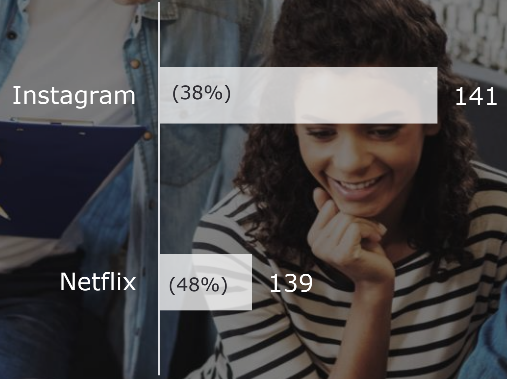
Media consumption reveals generations' media "badges"

Older generations spend more time on TV, FB & Radio while younger ones consume more YT, Netflix & Instagram

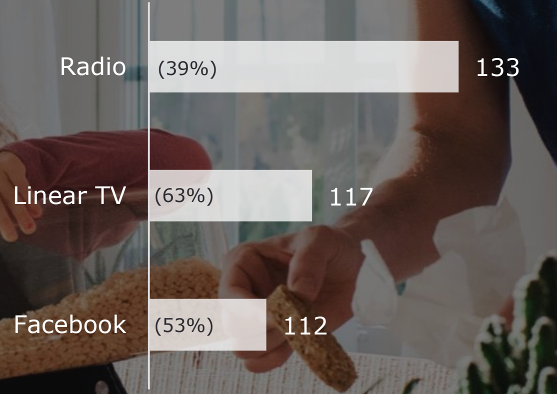
Generation Z
(17-24 y.o.)



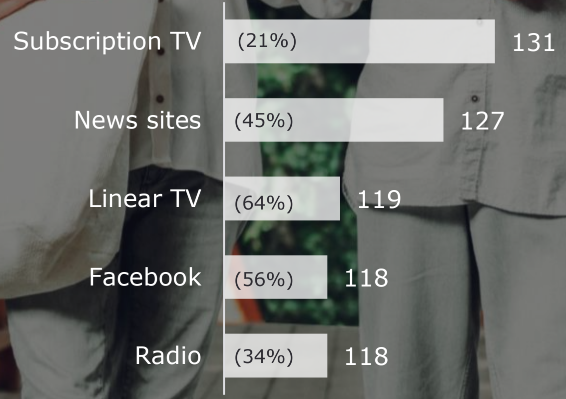
Millennials
(25-34 y.o.)



Generation X
(35-54 y.o.)



Baby Boomers
(55+ y.o.)



Top scoring Media consumed more compared to the pre-Coronavirus period (ranked by affinity >110) / Values in parentheses refer to volume

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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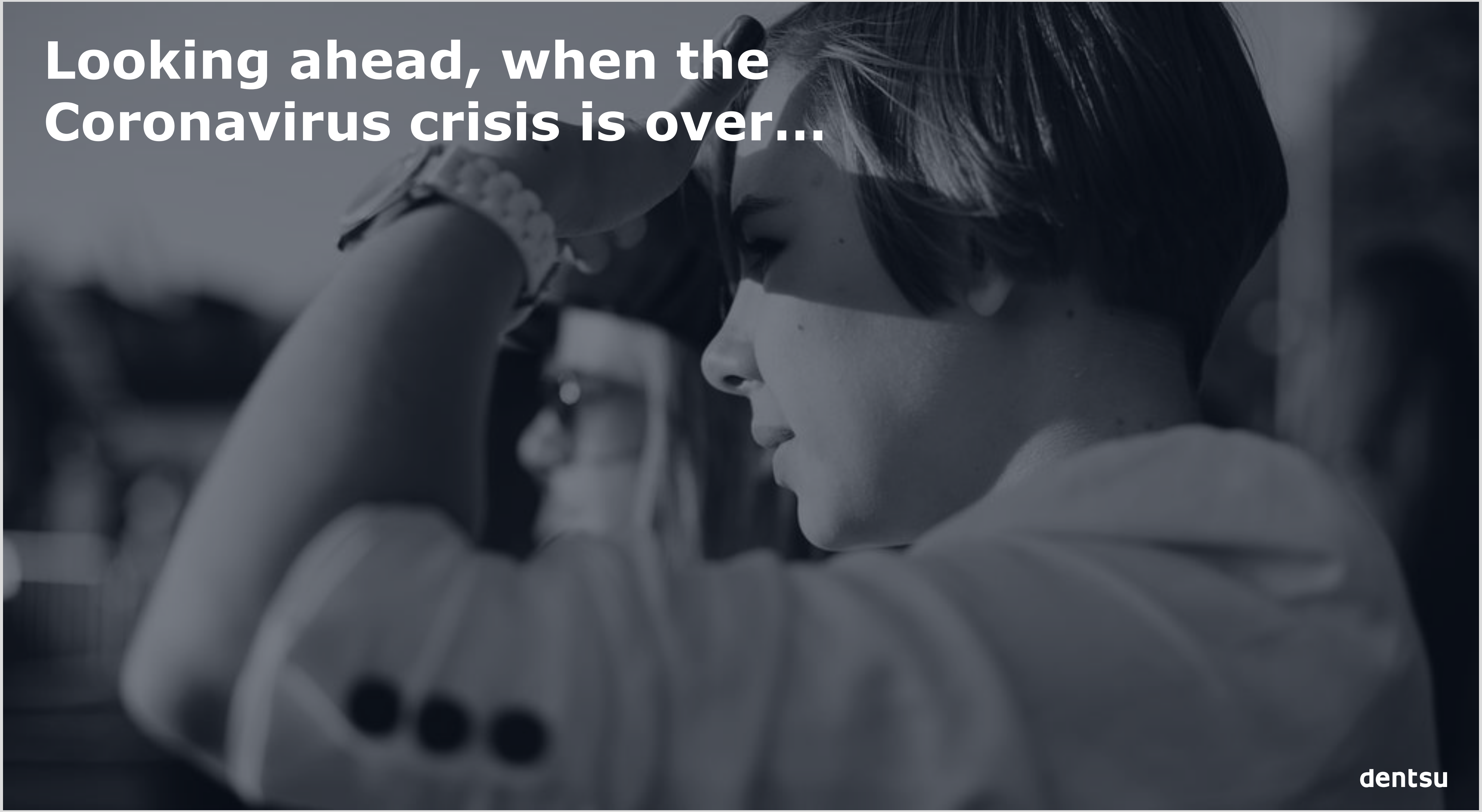
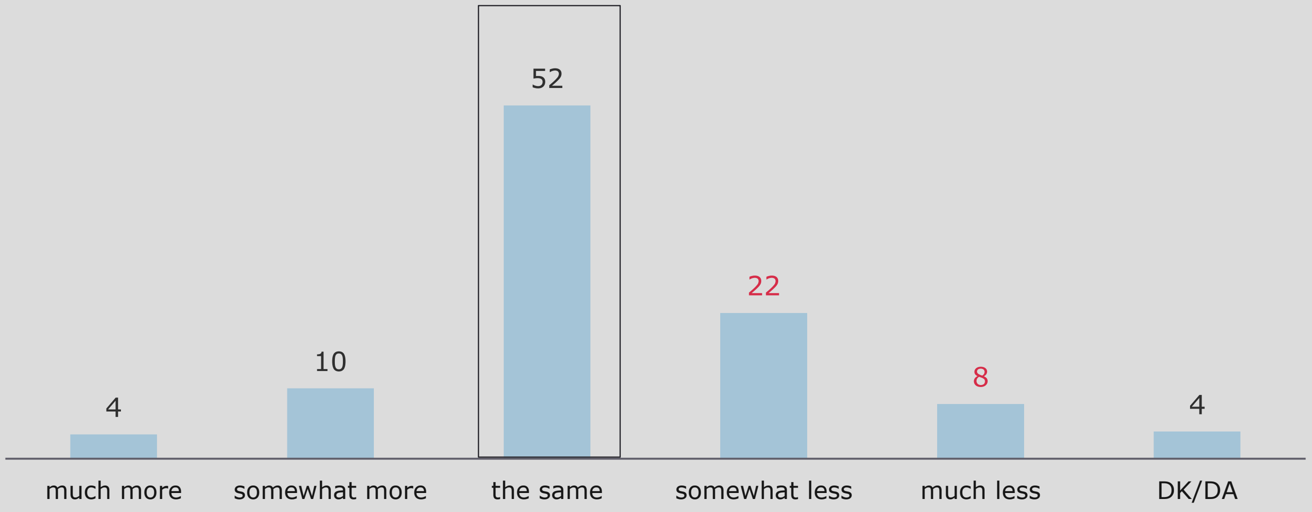
Looking ahead, when the Coronavirus crisis is over…



…*change* is tough to be admitted…



When the Coronavirus crisis is over, how do you think your behavior towards spending your money will change compared to the pre-crisis period? I will be spending…

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

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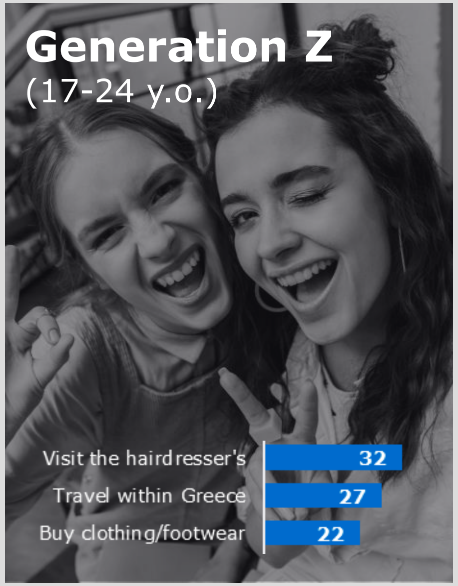
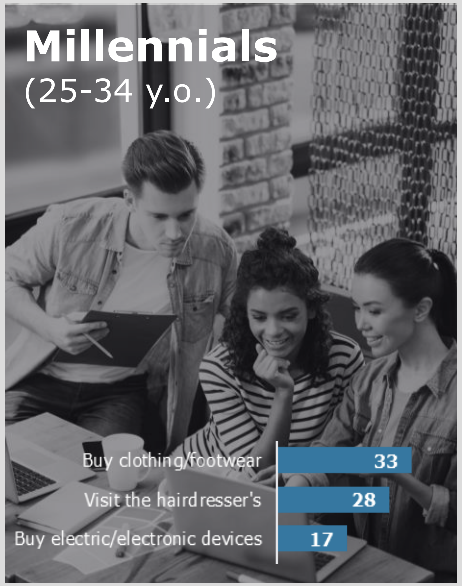
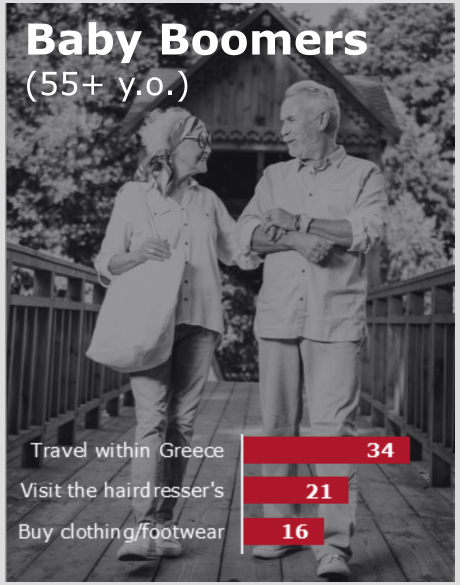
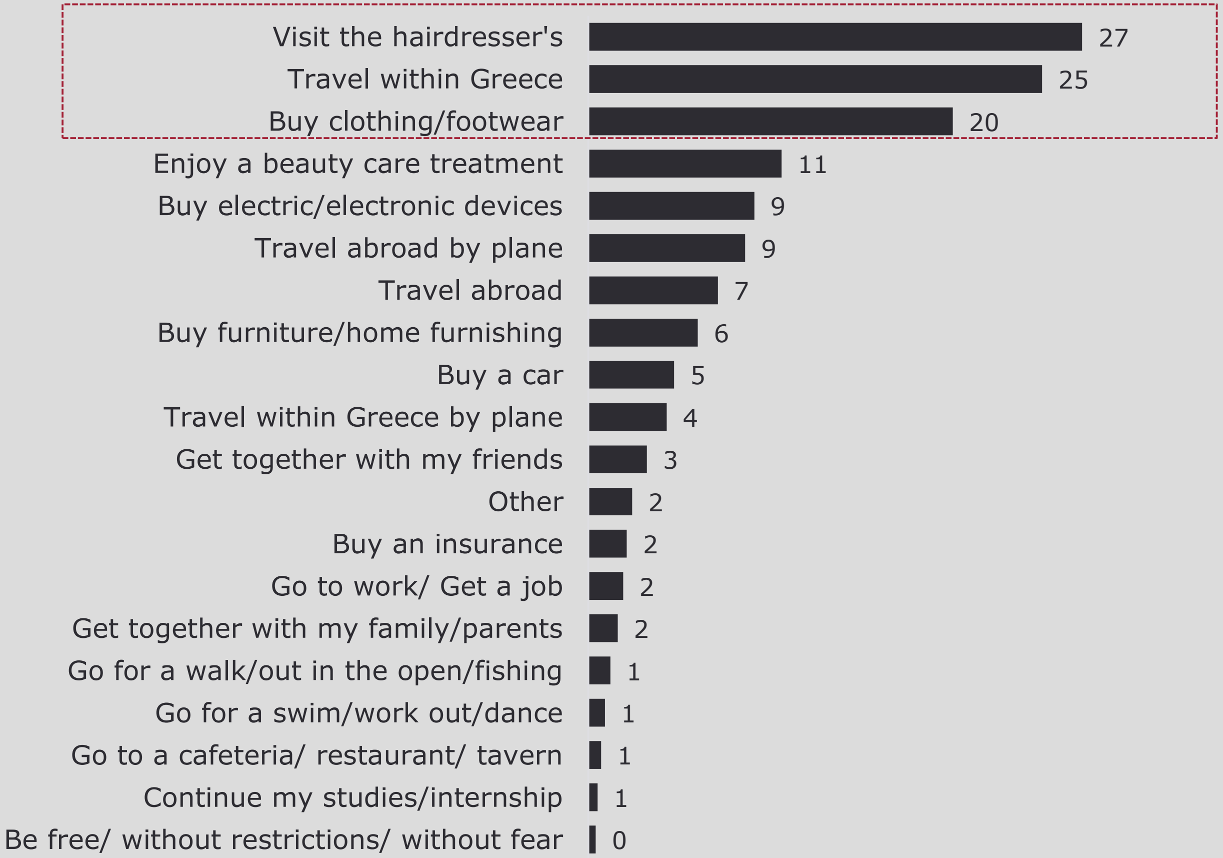
... and the need to treat ourselves is unanimous







What would you like to do when the Coronavirus crisis is over?



Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 1

New Normal mandate for Brands

From communication to communicACTIONS

‘Keep the brand light burning…’

70%

want to continue to hear from brands & companies on what they have to offer (during the COVID-19 crisis)

Source: Ipsos Brand & Communications Poll

PURPOSE AS A NORTHERN STAR

It helps navigating the uncertainty: when you know why, you know what

ACT & LIVE LOCALLY

Brands are expected to play a leading role within the society

FRICTIONLESS DIGITAL SERVICES ARE NOT AN OPTION

Innovation shape what your customers expect from you

NEW ENGAGEMENT RULES: RIGHT HERE, RIGHT NOW

New connection points require agility in content creation and distribution

Waiting to taste freedom together ☺

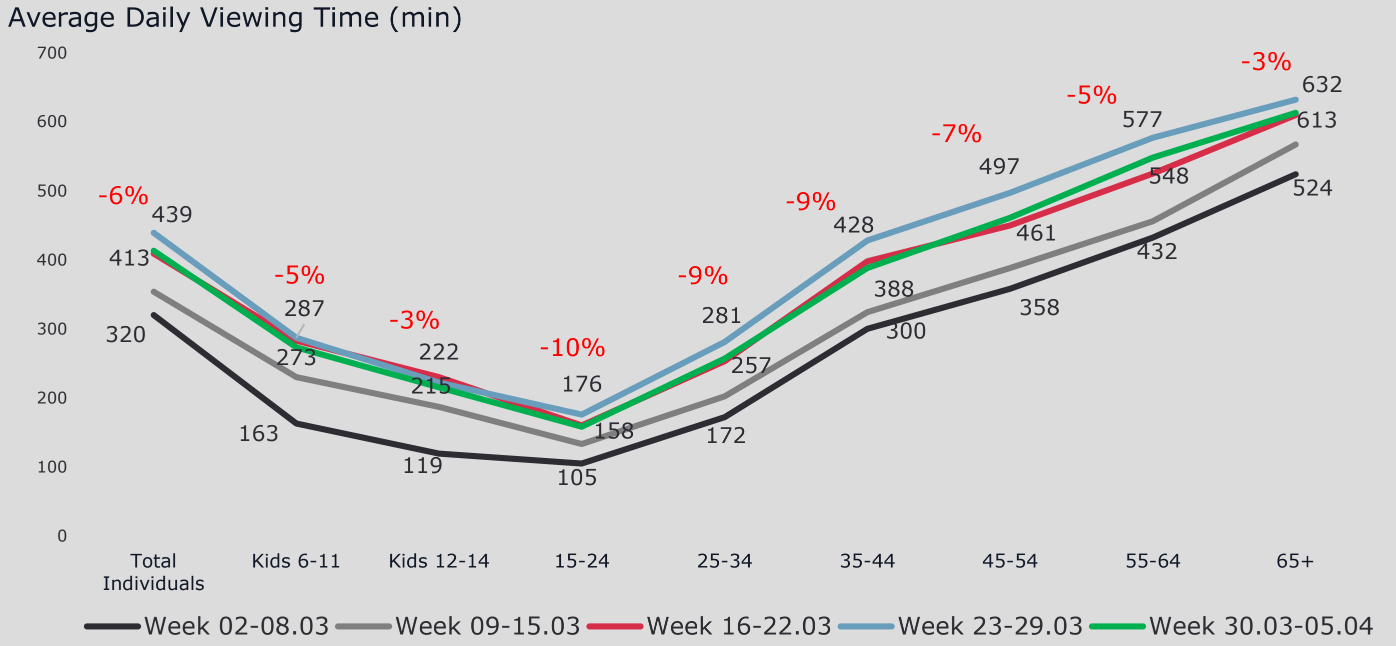
Catching up with this week on Media

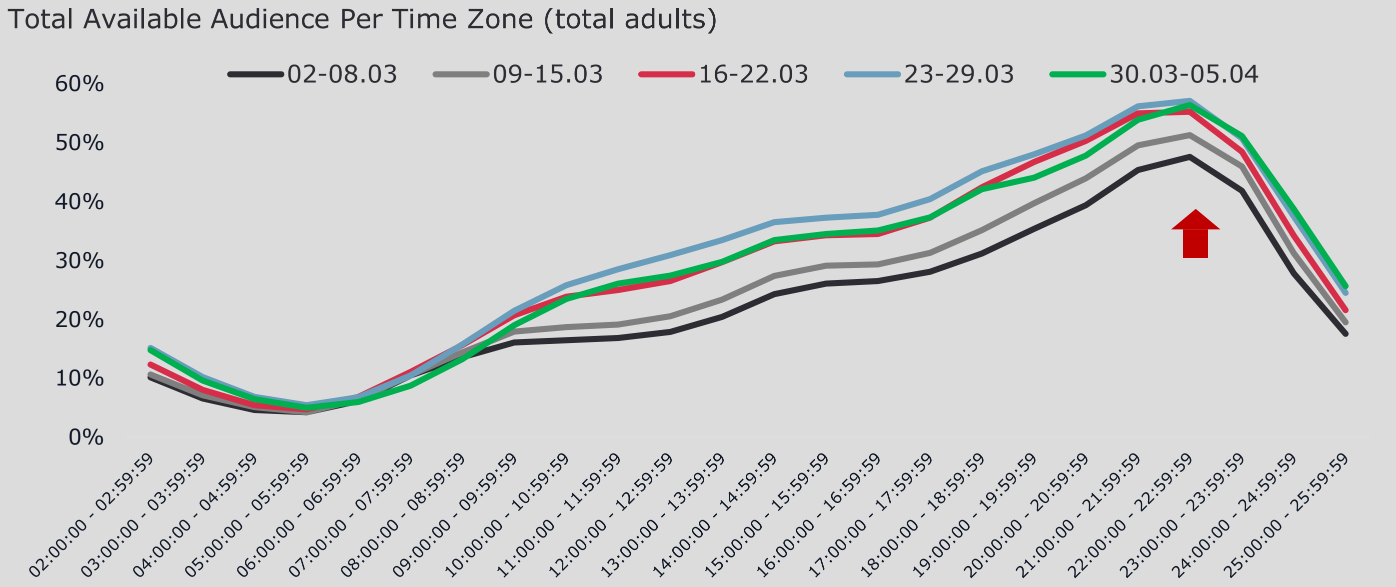
- TV
- Radio
- Digital

Media update

- TV

During the last week (31/03-05/04) Viewership has slightly decreased comparing to previous week ; still remains very high.





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Source :Nielsen Audience Measurement

Media update

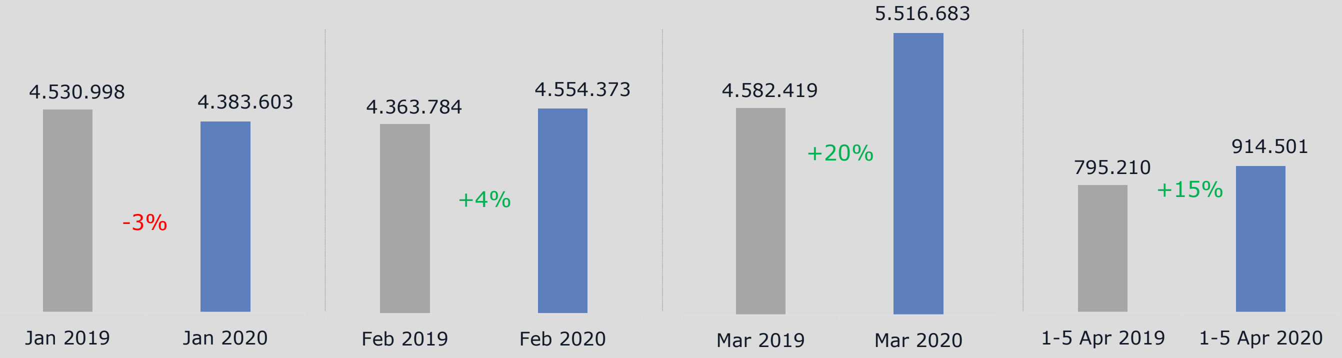
- TV

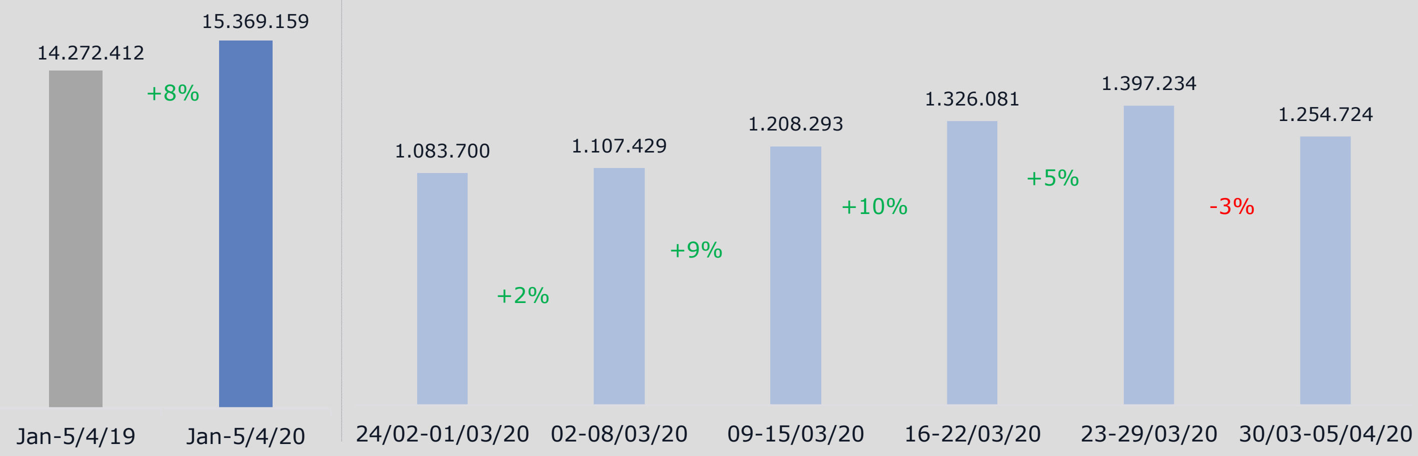
Overall advertising pressure has increased by 8% in 2020 YTD while the increase is 20% in March 2020 vs YA.

Similar pattern for the first 5 days of April. (+15% vs YA)

Total Market (GRPsxsec)

TARGET AUDIENCE ADULTS 18-54





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Source : Nielsen Audience Measurement / Media Services

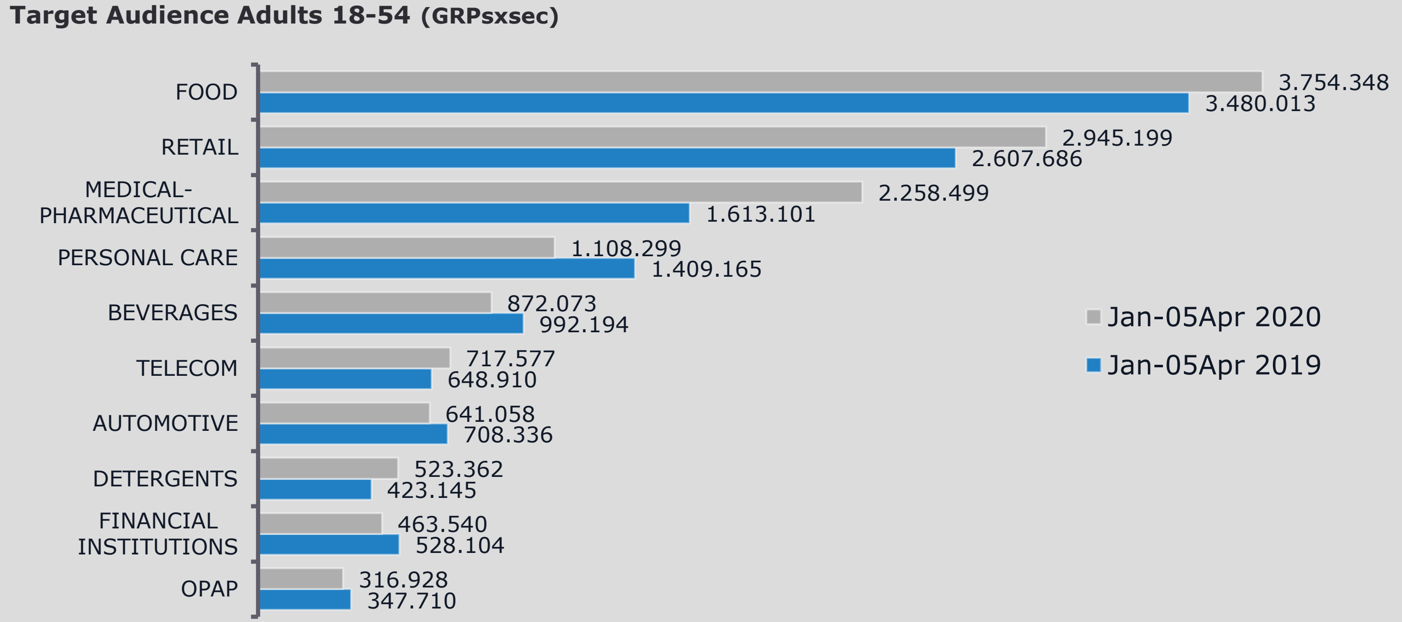
Media update

- TV

Food is the No1 category in terms of advertising volume.

Retail, Pharmaceuticals & Detergents are the categories with the highest growth, followed by TELCOs

Top Adv. Categories 2020vs2019



Jan-05.04.20 vs Jan-05.04.19

Food is the #1 category for both years, with a 8% increase in 2020, followed by **Retail**(+13%)and **Medical products (**+40%.)

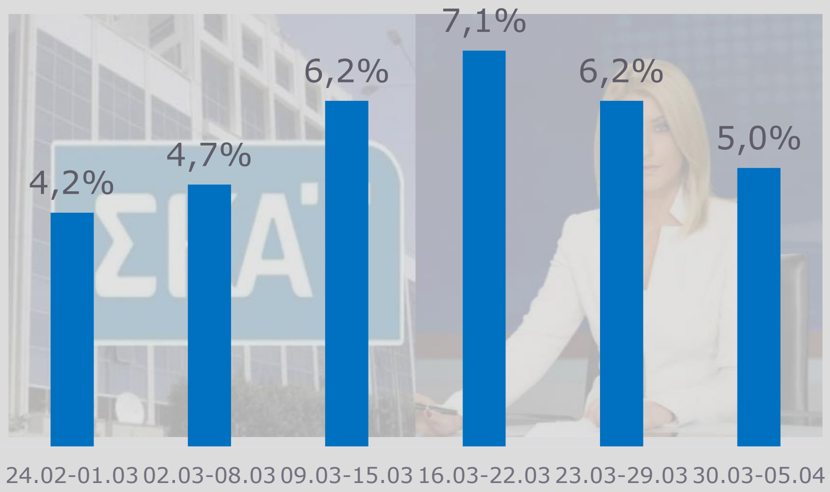
Remarkable increase also for **Detergent**s(+24%), while **Personal Care** and **Financial Institutions** presented a considerable decrease(-21% and -12% accordingly)

Category	Jan-5Apr 2020	Jan-5Apr 2019	Dif 19/20
FOOD	3.754.348	3.480.013	8%
RETAIL	2.945.199	2.607.686	13%
MEDICAL-PHARMACEUTICAL	2.258.499	1.613.101	40%
PERSONAL CARE	1.108.299	1.409.165	-21%
BEVERAGES	872.073	992.194	-12%
TELECOM	717.577	648.910	11%
AUTOMOTIVE	641.058	708.336	-9%
DETERGENTS	523.362	423.145	24%
FINANCIAL INSTITUTIONS	463.540	528.104	-12%
OPAP	316.928	347.710	-9%

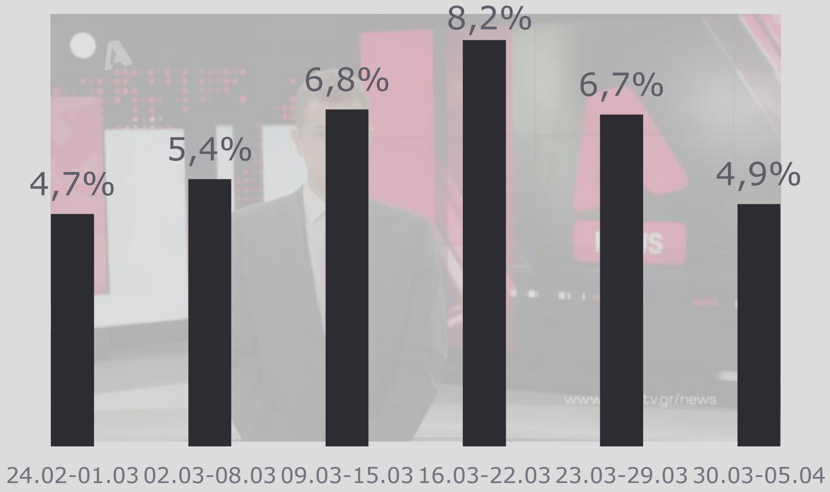
Source : Nielsen Audience Measurement / Media Services

Interest in News is gradually stabilising

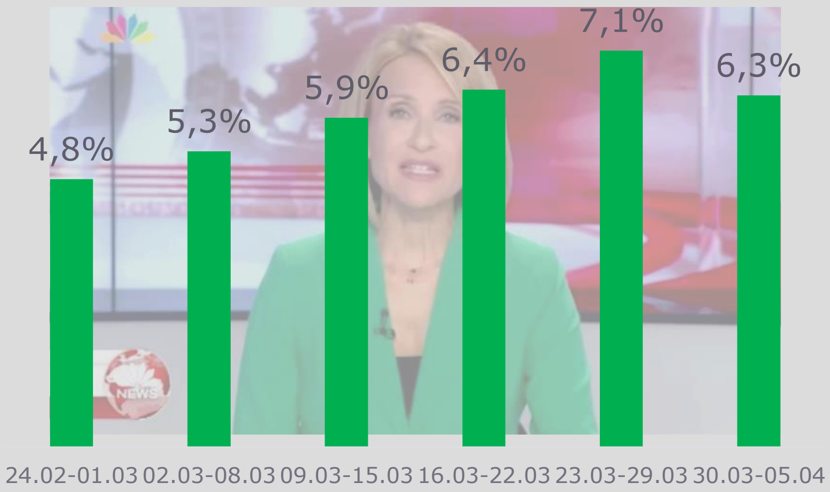
SKAI



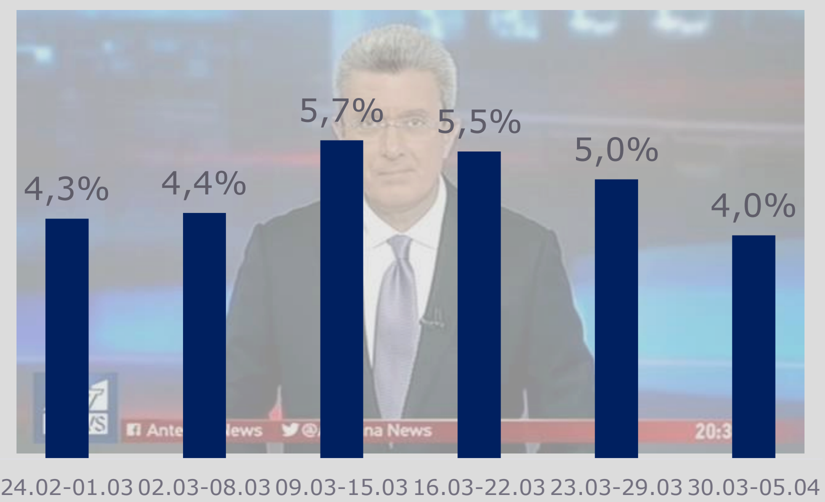
ALPHA



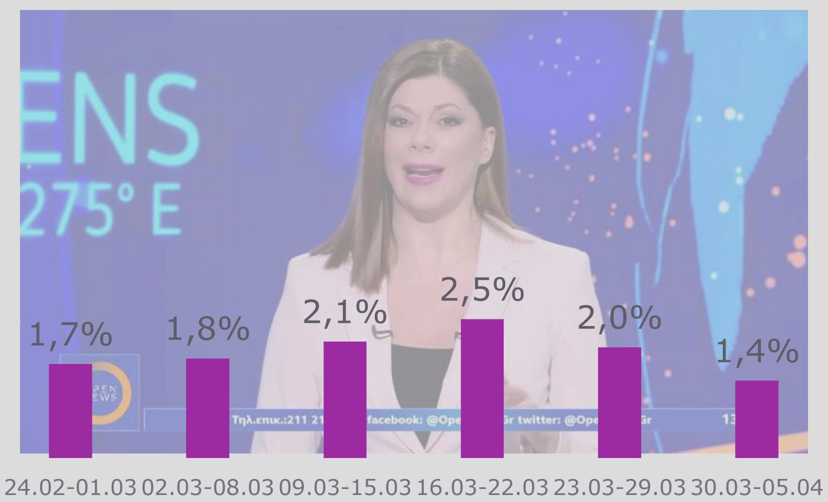
STAR



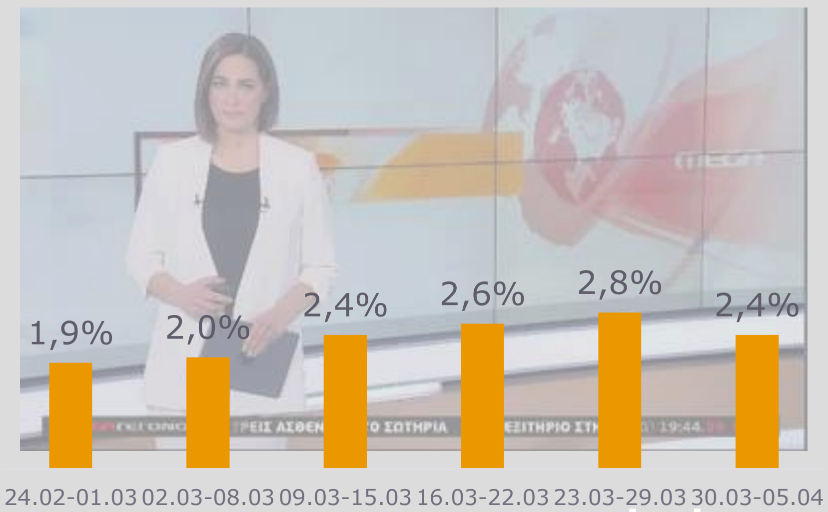
ANTENNA



OPEN



MEGA

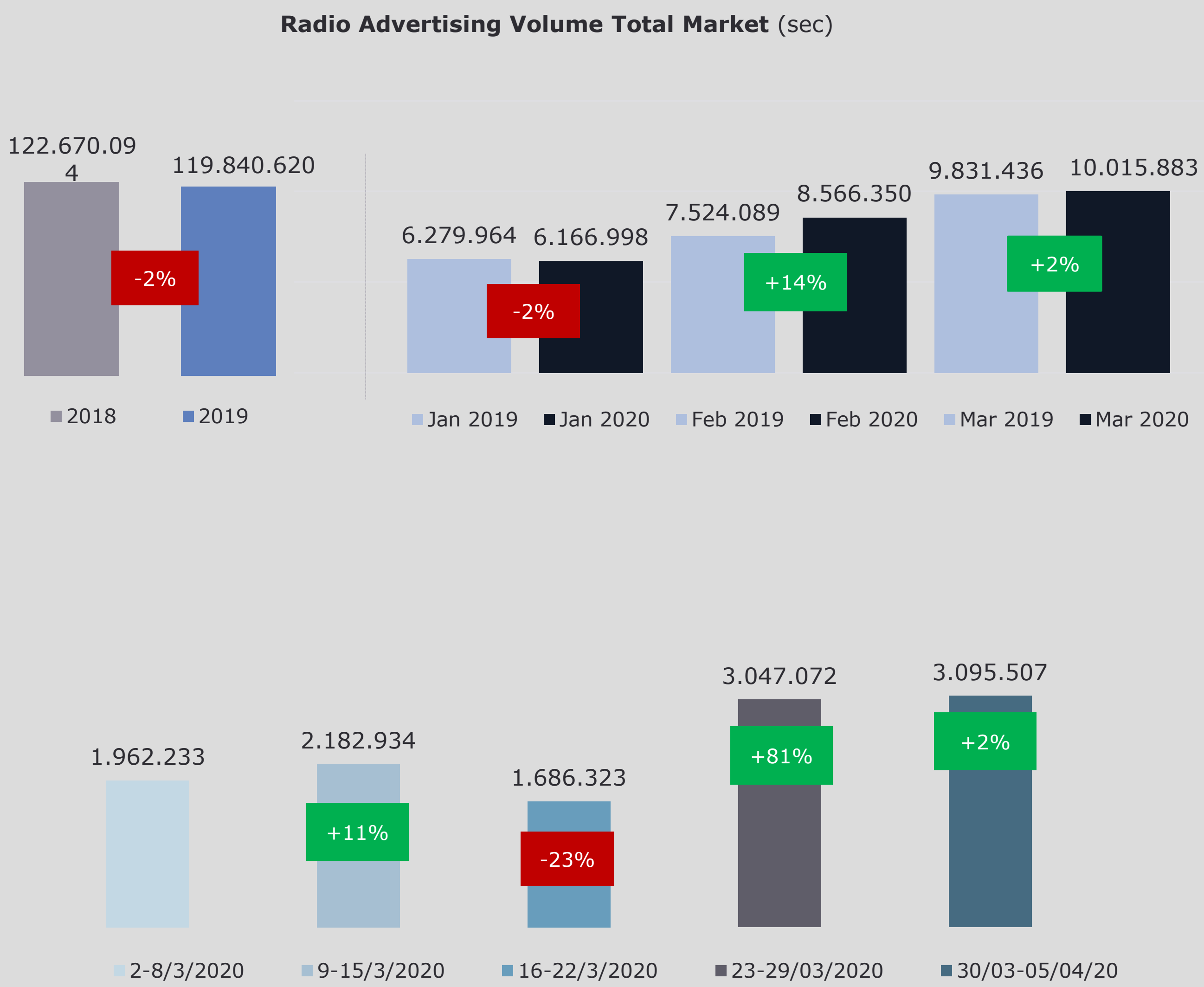


Target Audience : 18-54 ,
Source : Nielsen Audience Measurement (AMR)

Media update

- Radio Advertising Volume

  The last week of March, a dedicated to COVID-19 campaign was launch by the Ministry of Health & impacted significantly the Radio's volume



Source: Spot Monitor

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Media update

- Radio

News radio stations are the ones with significant audience increase

Source: AEMAR, MRB

Overall, Radio listenership has been decreased considerably (75,6% vs 82% = -6,4%)

STATION	03/02-01/03	02/03-29/03	Diff.
95.2 ATHENS DEE JAY	16,6%	14,0%	-16,1%
RYTHMOS 9 49	13,6%	11,4%	-16,1%
DROMOS 89.8	12,3%	10,4%	-15,7%
RED 96.3	12,6%	10,1%	-19,7%
SFERA 102.2	11,9%	9,85%	-17,5%
HIT 8 8 9	10,5%	9,25%	-11,5%
DIESI 101.3	8,25%	8,71%	5,6%
9 6 9 ROCK	12,1%	8,41%	-30,7%
MAD RADIO 106.2	9,65%	7,37%	-23,6%
92.3 LAMPSI	9,46%	7,08%	-25,2%
EN LEFKO 87.7	7,90%	6,53%	-17,3%
MUSIC 89.2	7,17%	6,12%	-14,6%
BEST 92.6	6,74%	6,10%	-9,4%
MELODIA 99.2	7,35%	5,80%	-21,0%
SKAI 100.3	5,04%	5,78%	14,7%
KISS FM 92.9	6,88%	5,52%	-19,9%
PEPPER 96.6	7,70%	5,47%	-29,0%
SPOR FM 94.6	7,13%	5,32%	-25,3%
REAL FM 97.8	4,30%	4,50%	4,6%
EASY 97.2	7,50%	4,40%	-41,4%
MENTA 88	4,88%	4,22%	-13,6%
ELLINIKOS 93.2	5,16%	3,75%	-27,3%
SPORT 24 RADIO 103.3	5,00%	3,35%	-33,1%
LOVE RADIO 97.5	5,52%	3,26%	-41,0%
MOUSIKOS 98.6	3,93%	2,84%	-27,9%
KOSMOS 93.6/107.0	2,36%	2,45%	4,0%
GALAXY 92	3,35%	2,38%	-29,1%
PARAPOLITIKA 90.1	1,92%	1,89%	-1,1%
ERT2	1,25%	1,53%	22,1%
LEGEND 88.6 (FORMER 88.6)	1,77%	1,39%	-21,5%
ERT3	1,53%	1,27%	-17,4%
ERA SPOR 101.8/100.9	2,30%	1,10%	-52,0%
ALPHA 9 89	0,96%	0,81%	-15,1%
105&5 STO KOKKINO	1,26%	0,79%	-37,4%
ERT1	0,51%	0,68%	34,5%
ATHENS VOICE RADIO 102.5	0,37%	0,46%	23,6%
CHRISTIANISMOS 104.3	0,47%	0,35%	-26,2%

Radio Listenership
Target Group: Adults 15-44
Period: 03.02 – 01.03 vs 02.03 – 29.03

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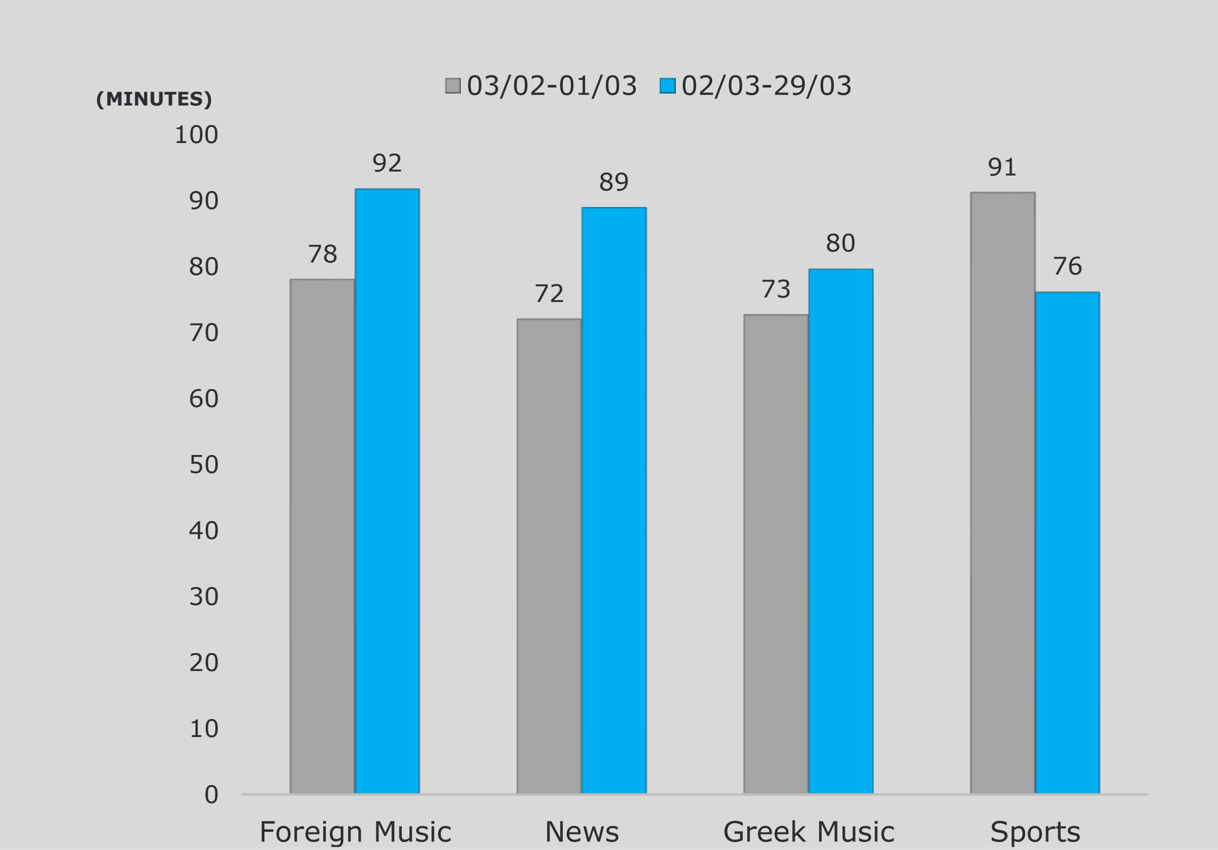
Media update

- Radio

Radio Core Audiences listen more across all type of stations

Source: AEMAR, MRB

Average Daily Listenership Duration



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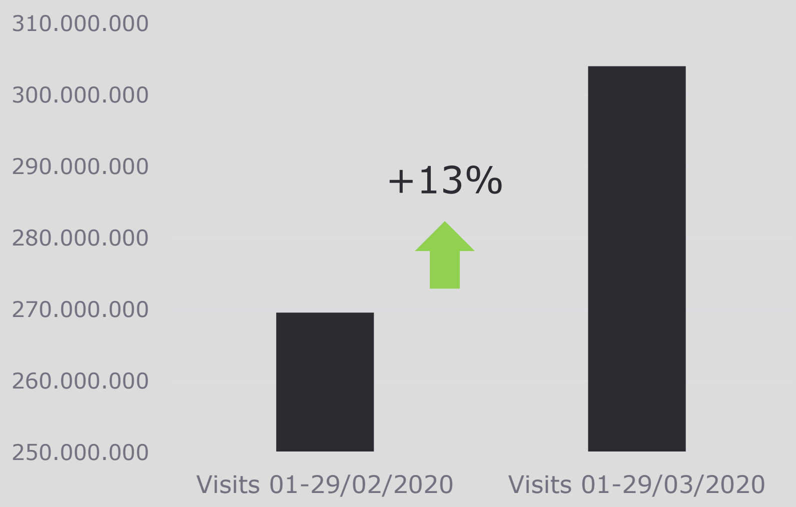
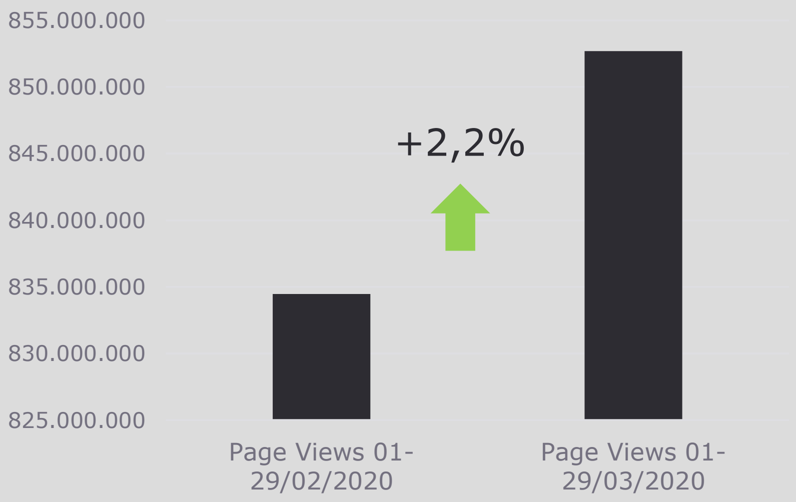
Media update

- Digital

Visits and Pageviews increased in March vs February 2020



Visits
01-29/03/2020: 304.057.401
01-29/02/2020: 269.590.595
Total Increase 13%



Pageviews
01-29/03/2020: 852.696.104
01-29/02/2020: 834.456.420
Total Increase 2,2%

Source : Google Analytics

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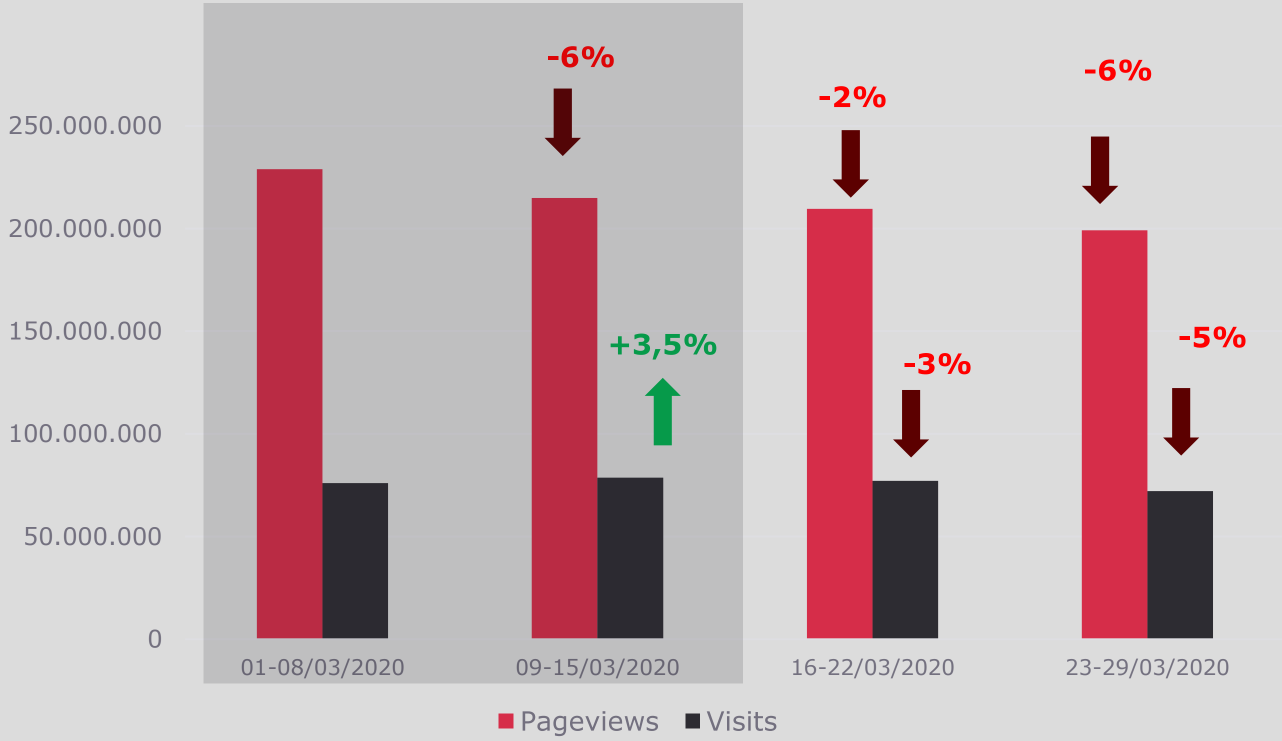
Media update

- Digital

But ,with a declining trend as we get deeper in the crisis



Source : Google analytics

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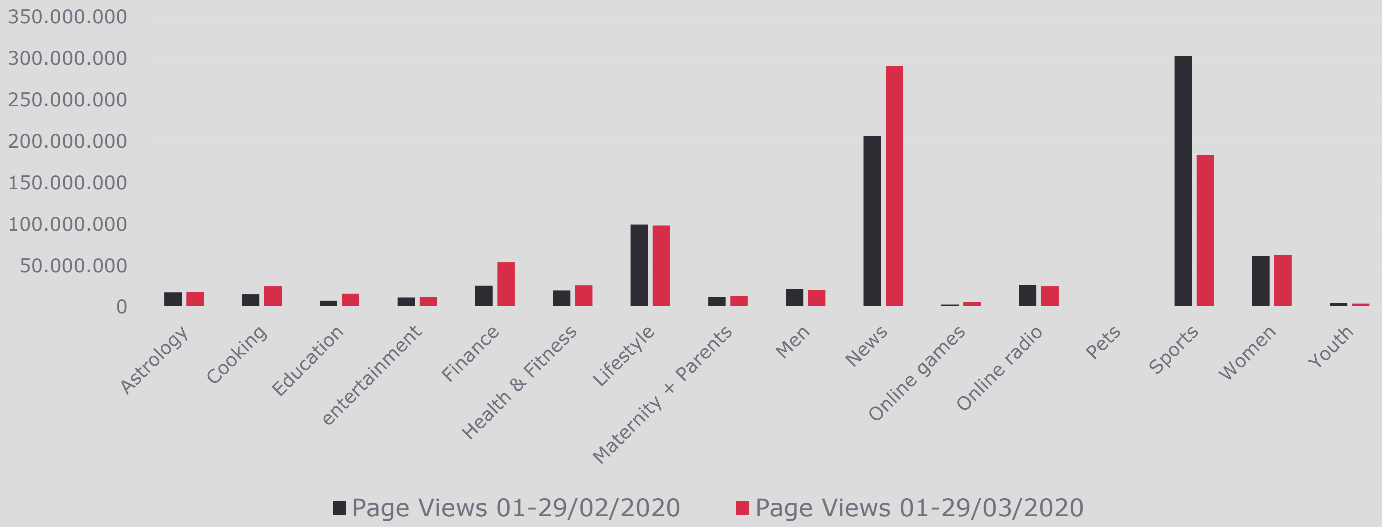
Media Update

- Digital

NEWS being the driving force while ONLINE GAMES, EDUCATION & FINANCE have doubled in attention score.



Web Site Category	Page Views 01-29/02/2020	Page Views 01-29/03/2020	%Diff Pageviews 01-29/03/2020 VS 01-29/02/2020
Astrology	17.585.951	17.897.555	2%
Cooking	15.134.385	24.869.771	64%
Education	7.484.196	15.921.289	113%
Entertainment	11.364.640	11.869.782	4%
Finance	25.706.466	53.945.861	110%
Health & Fitness	19.805.991	25.985.003	31%
Lifestyle	99.365.825	98.020.528	-1%
Maternity + Parents	12.073.719	13.083.000	8%
Men	21.669.466	20.016.061	-8%
News	205.840.920	290.319.160	41%
Online games	2.668.182	5.776.622	117%
Online radio	26.423.210	24.661.550	-7%
Pets	607.374	598.262	-2%
Sports	302.622.819	183.292.540	-39%
Women	61.549.505	62.283.561	1%
Youth	4.553.771	4.155.559	-9%
Grand Total	**834.456.420**	**852.696.104**	2%

SoMe update

Global and Greek brands are now **genuinely involved by:**

- Engaging in CSR initiatives to support healthcare
- Providing uplifting and helpful content
- Sparking the conversation for UGC within communities (i.e. moms)

Users are further receptive to brands’ communication, if relevant and eager to participate in the conversation.

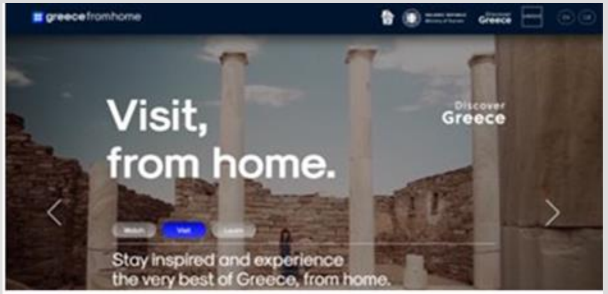
Brands in SoMe

Intensive CSR initiatives to support healthcare

Essential products creation by companies with relevant expertise

Streaming to entertain users at home

Alternative service offering for home consumption



Increasing consumer generated content

dentsu

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How can we help?

Please contact your agency contact to discuss actions and scenario planning

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