

# dentsu

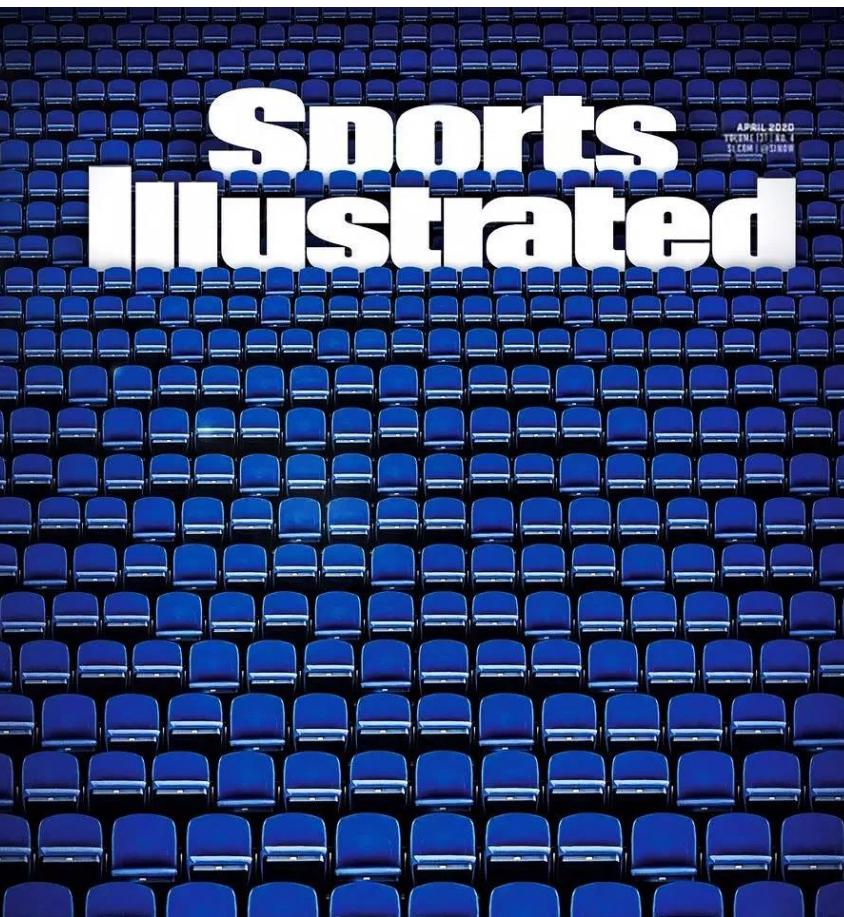
## *DECODING COVID-19*

Observations, implications, possible actions

Greece – 4.0

Athens, April 14th, 2020





**ONE** hundred days after a Chinese government website announced the discovery of a “pneumonia of unknown cause”, the world began this week to see small but encouraging signs that the spread of the novel coronavirus is slowing down. In the Chinese city of Wuhan, residents are taking baby steps toward some version of normality. In Italy, the rate of contagion is decreasing. The United States reluctantly see “some glimmers of hope,” even in NYC, now the epicenter of the pandemic.

**“Yes, the storm will pass, humankind will survive, most of us will still be alive — but we will inhabit a different world”**

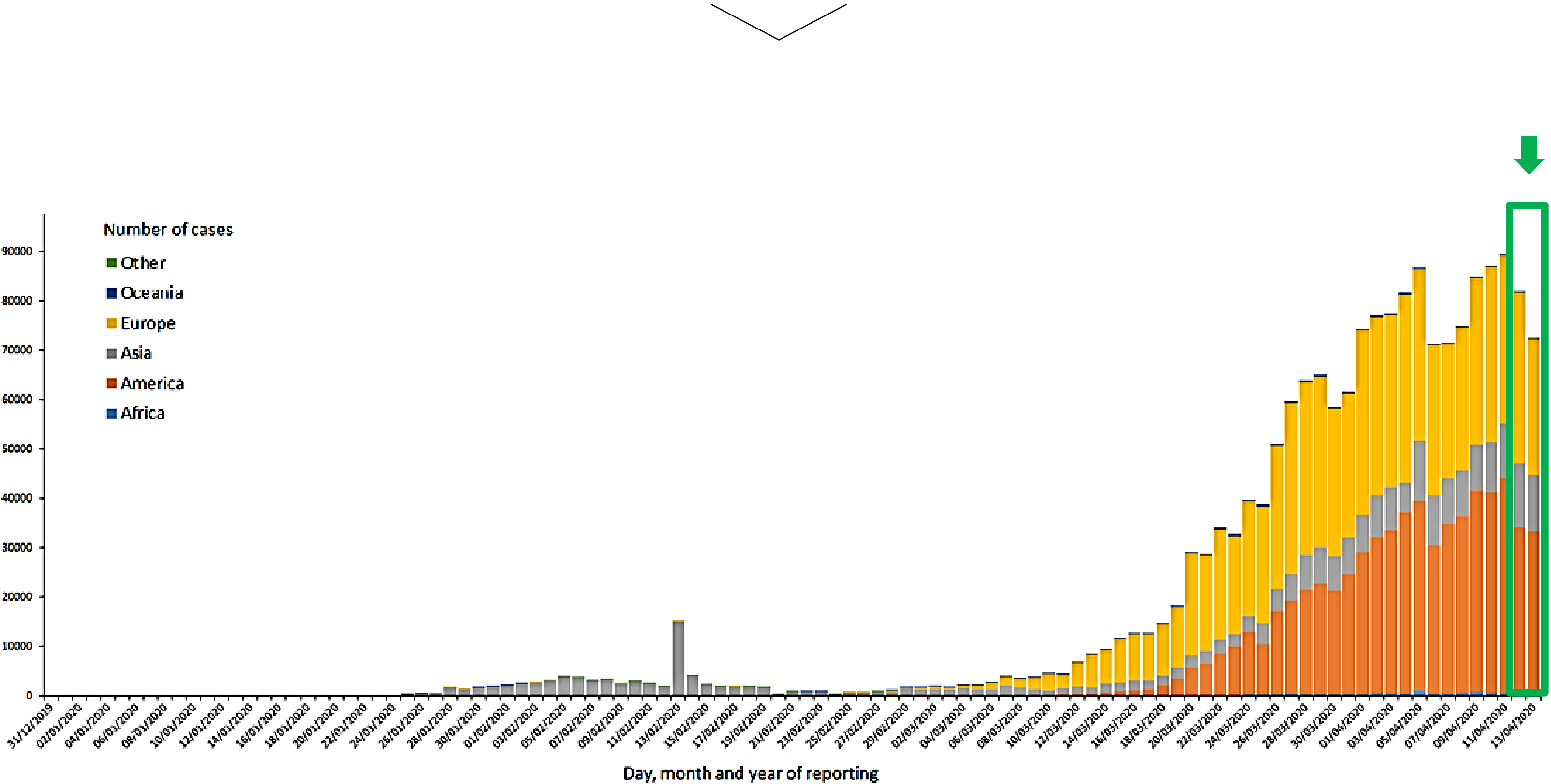
Yuval Noah Harari, FT

On the way to that different world, brands are already getting it right by making things of value, saying things of value & giving things of value, finally opting to be on the right side of the history.

**dentsu**



# First good news after outbreak



Source: ECDC (European Centre for Disease Prevention and Control)





# We are optimistic, still concerned...

**4/5** people globally say that the world **will overcome** the coronavirus outbreak

**Family** and **Friends** are the **Top concern** Globally (**46%**)  
while the **Country's Economy** and knowing when this situation will end comes second (**45%**)

\*Global Average % among GWI panel





... changing behaviors & adapting

**Almost 1 in 2** say they are doing **more online shopping**, while increases are focused around the essentials

Globally around **85%** report to undertaking some form of **exercise** during the pandemic, **41%** spend **more** time **cooking**

### Consuming Media, differently

66% watch more News

57% watch more shows/films on streaming devices

47% watch TV on broadcast channels

47% spend more time on SoMe

46% spend more time on messaging services

39% listen to more streaming services

\*Global Average % among GWI panel



# China is moving ahead to a “new normality”

People in China are still far from feeling “safe”,  
but they are in a better place than the rest of the world.

(30% of Chinese people say they are very/extremely concerned about Coronavirus, 26pps less than the global average)

*As businesses are gradually reopening...*

**major shopping malls**

(as of March 19th) 100%

**hypermarkets**

(as of March 19th) 99%

**hotels**

(as of February 27<sup>th</sup>) 80%

**restaurants**

(as of March 18th) 73%

*...so do People's routines*

~ **135%** growth of **restaurant** transactions

~ **70%** recovery of average daily sales of a leading **apparel company**

~ **7x** growth of **beauty salon** transactions

~ **50%** Recovery of metro passengers

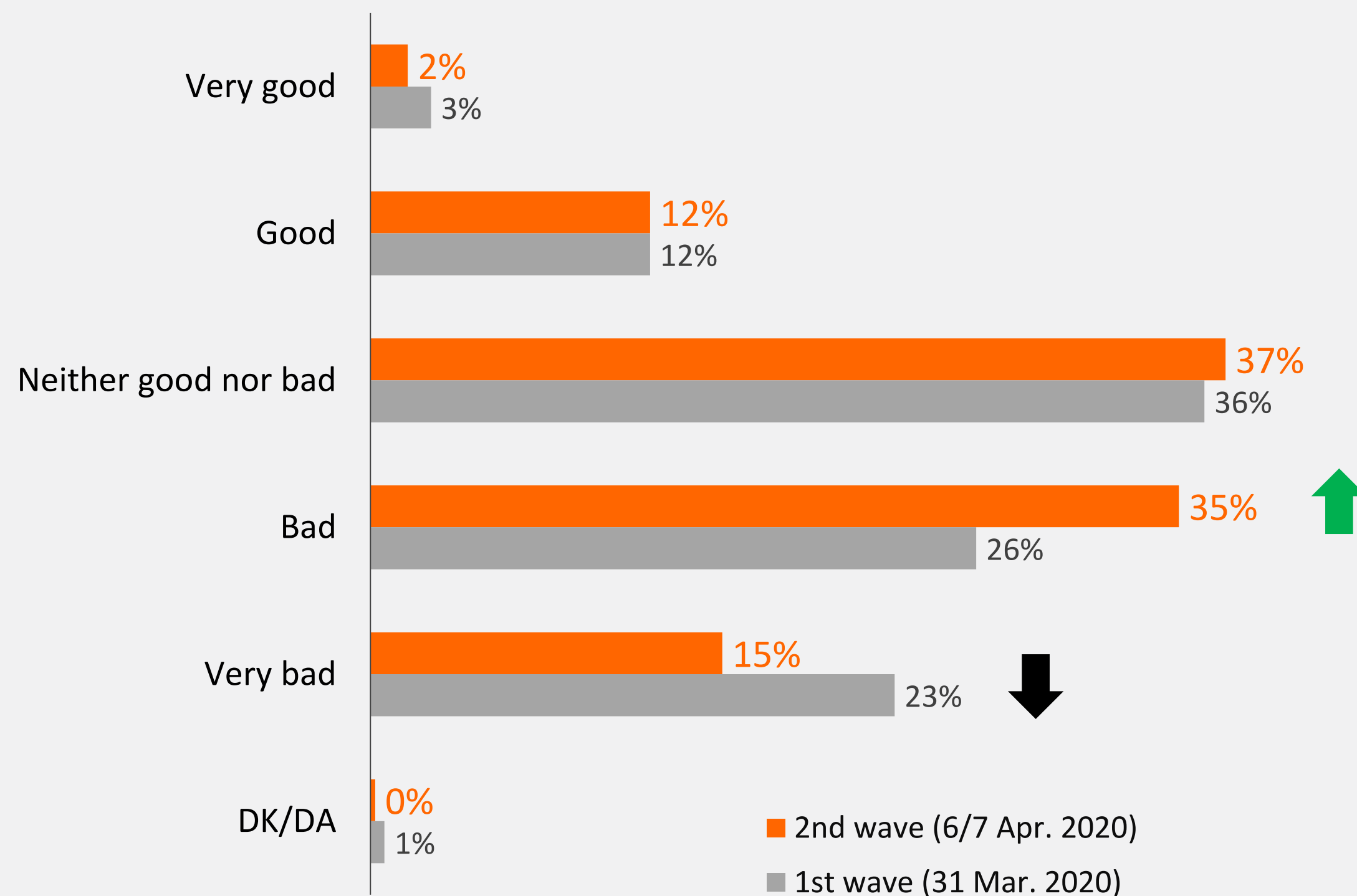


A close-up, high-angle shot of a child's hands and arms as they draw a vibrant rainbow on a dark asphalt surface using chalk. The child is wearing a blue denim shirt with rolled-up sleeves and dark blue sandals. Their left hand holds a piece of white chalk, while their right hand is actively drawing the pink band of the rainbow. The rainbow consists of several distinct, slightly blurred bands of color: red, orange, yellow, green, and blue. Other pieces of chalk in various colors are scattered on the ground near the child's feet. The overall scene conveys a sense of childhood creativity and play.

In Greece...



# *Society remains on pause, neutrality prevails, bad perspective lingers.*



Older ages are becoming more vulnerable  
and in need of our attention and care

## **BABY BOOMERS (55+ y.o)**

*“Things are getting very bad”*

19%

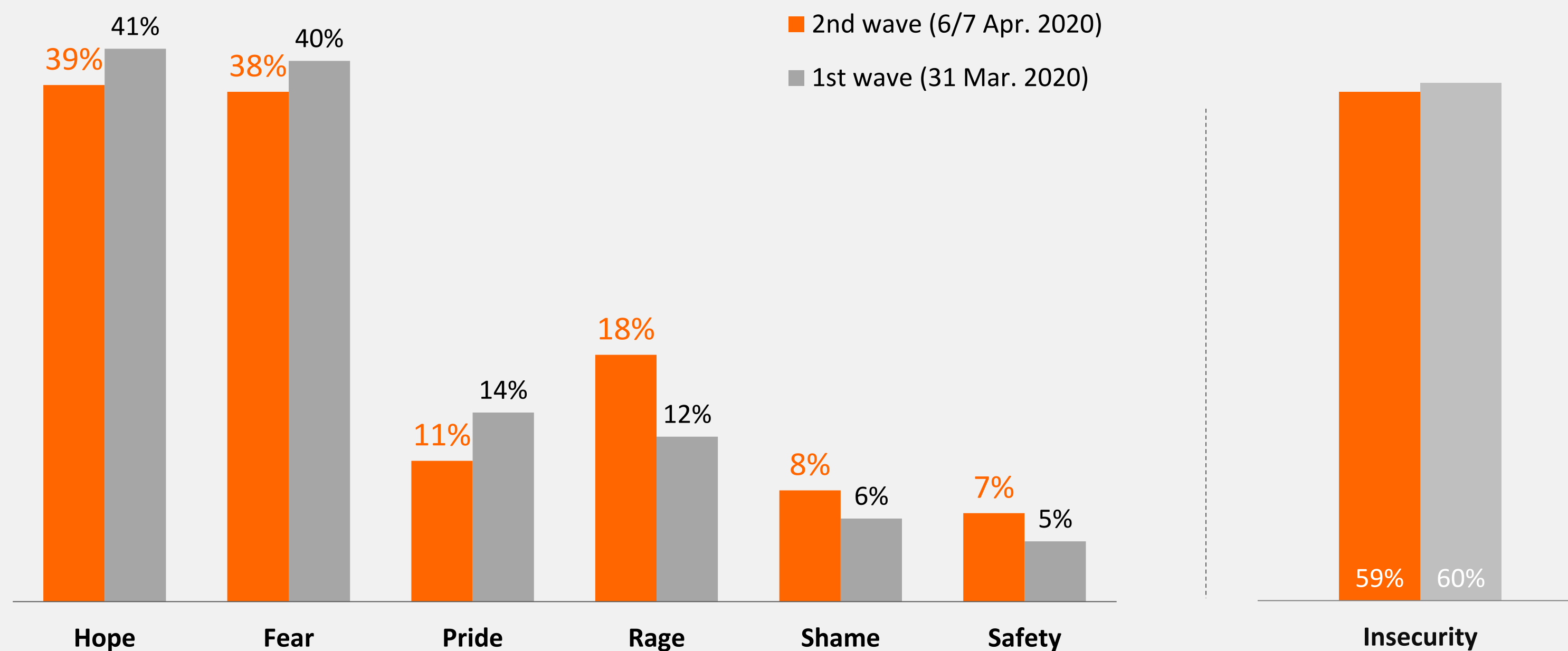
21%

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

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



# *Emotional edges smoothen, insecurity holds the grip of social sentiment.*



*Uncertainty mostly concentrated in ...*

*... Women (63%)*

*... Gen Z (75%)*

*... Millennials (64%)*

*... Gen X (58%)*

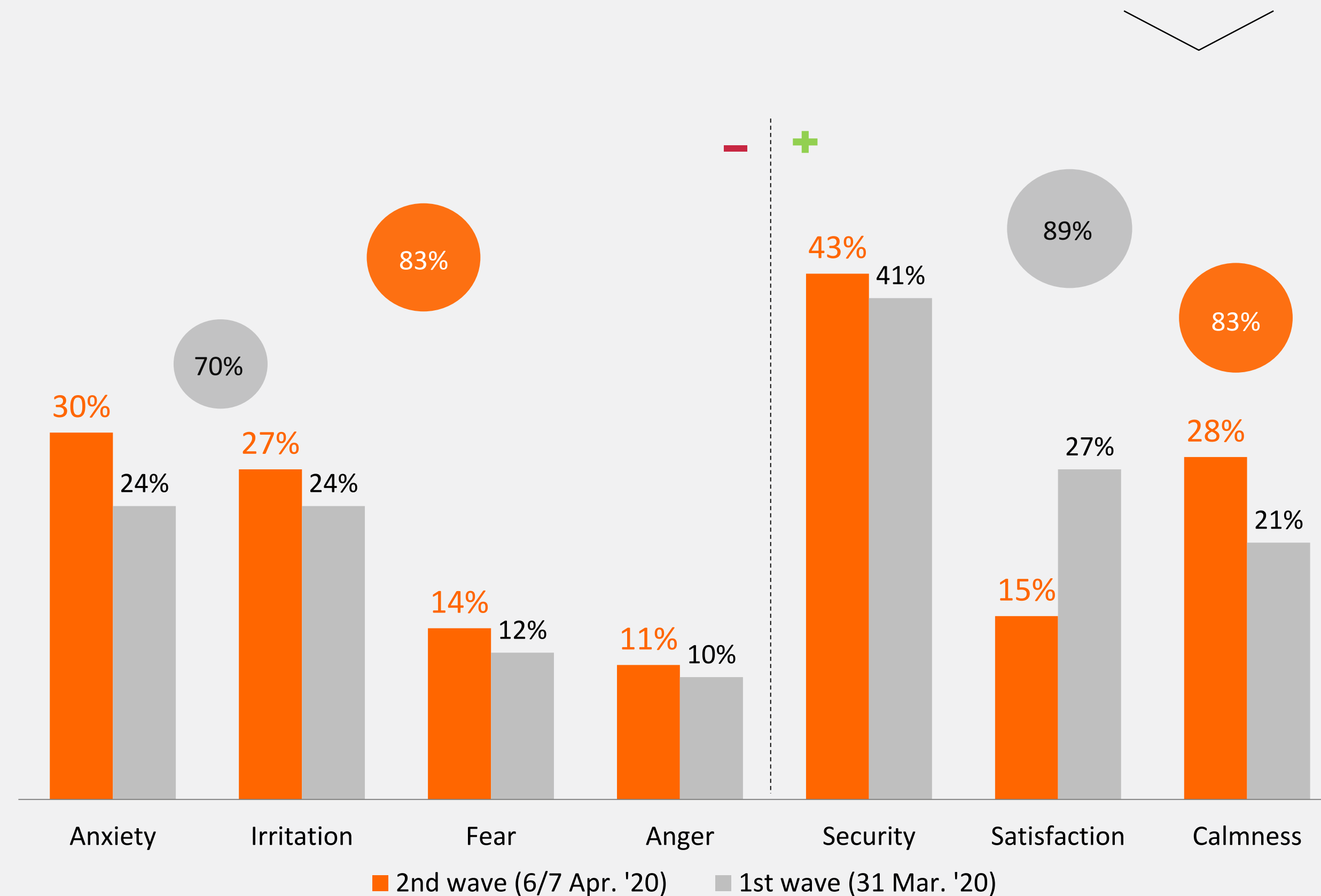
*Especially Men (24%) &  
Gen Z (18%)*

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

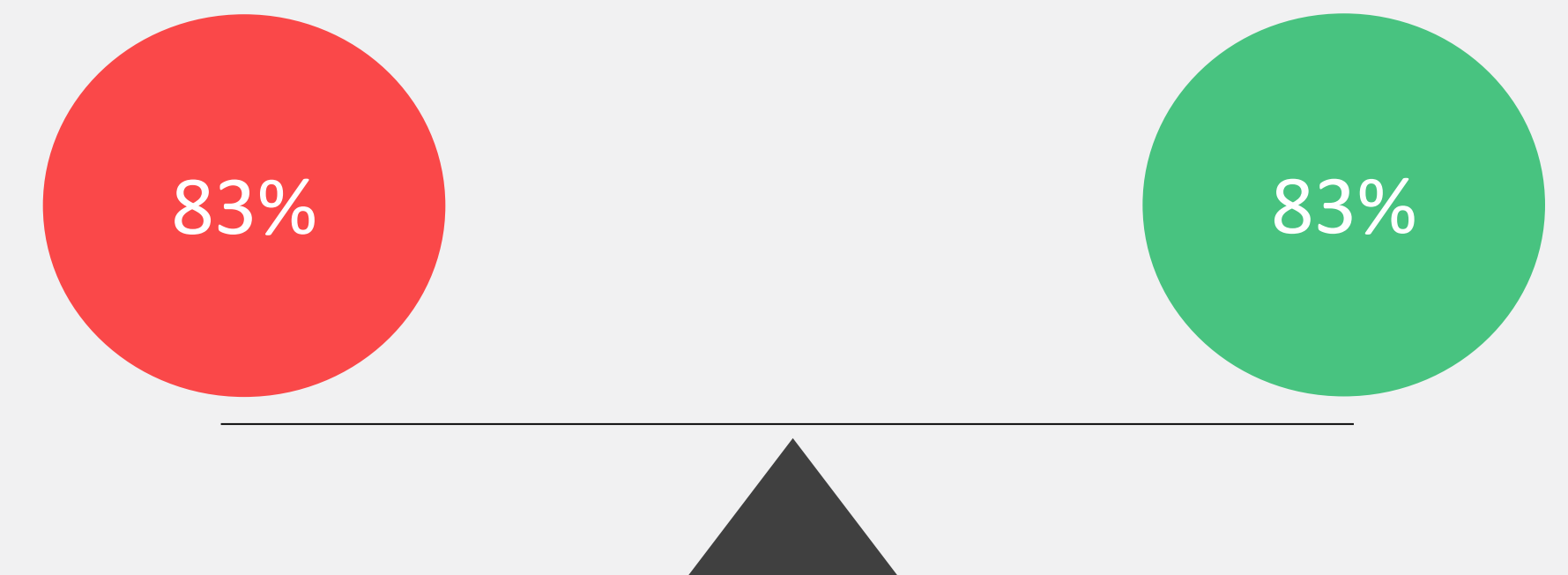
Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



# *As quarantine prolongs, emotional fatigue comes along...*



Within a week, Curfew grew the negative tension counterbalancing the initial positive feedback.

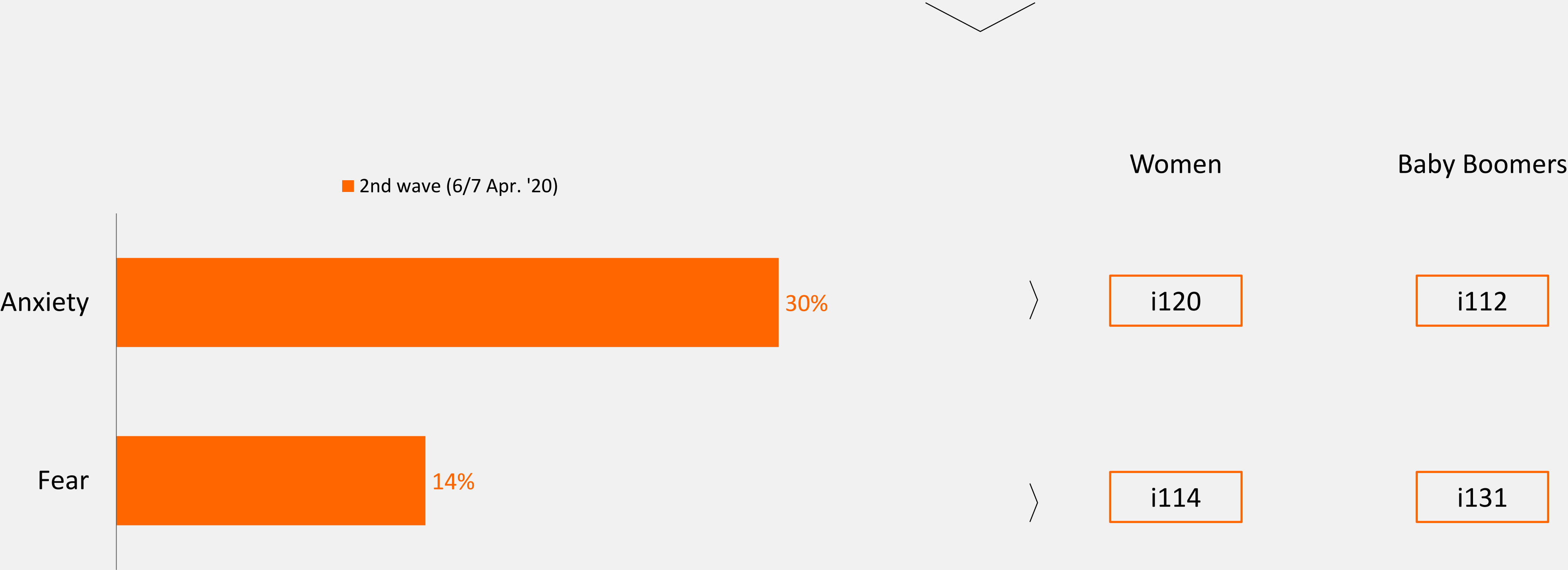


How the Covid curfew made you feel?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



*... especially for Women & Baby Boomers.*

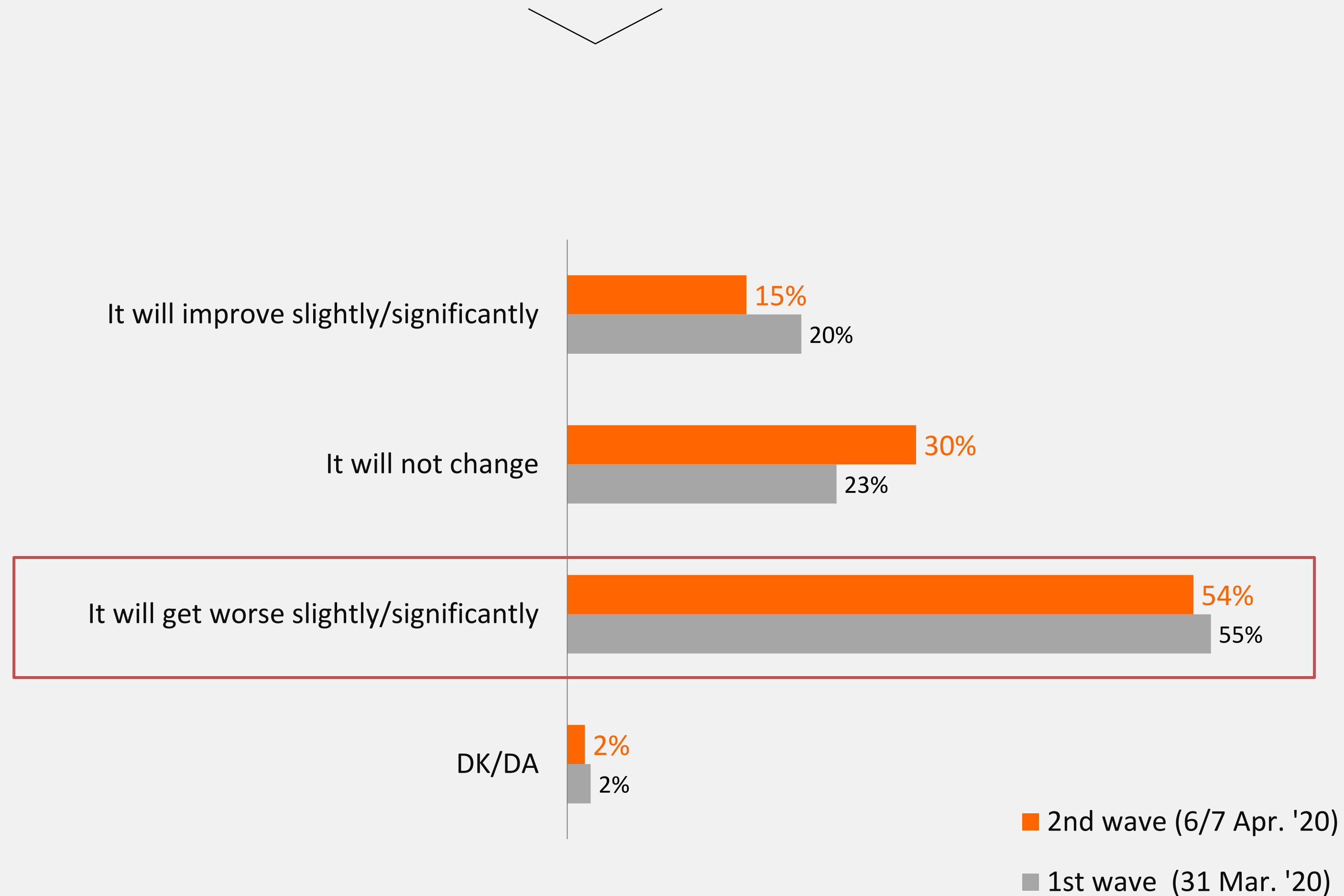


How the Covid curfew made you feel?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



# *Recessionary outlook on personal economics for the next months.*

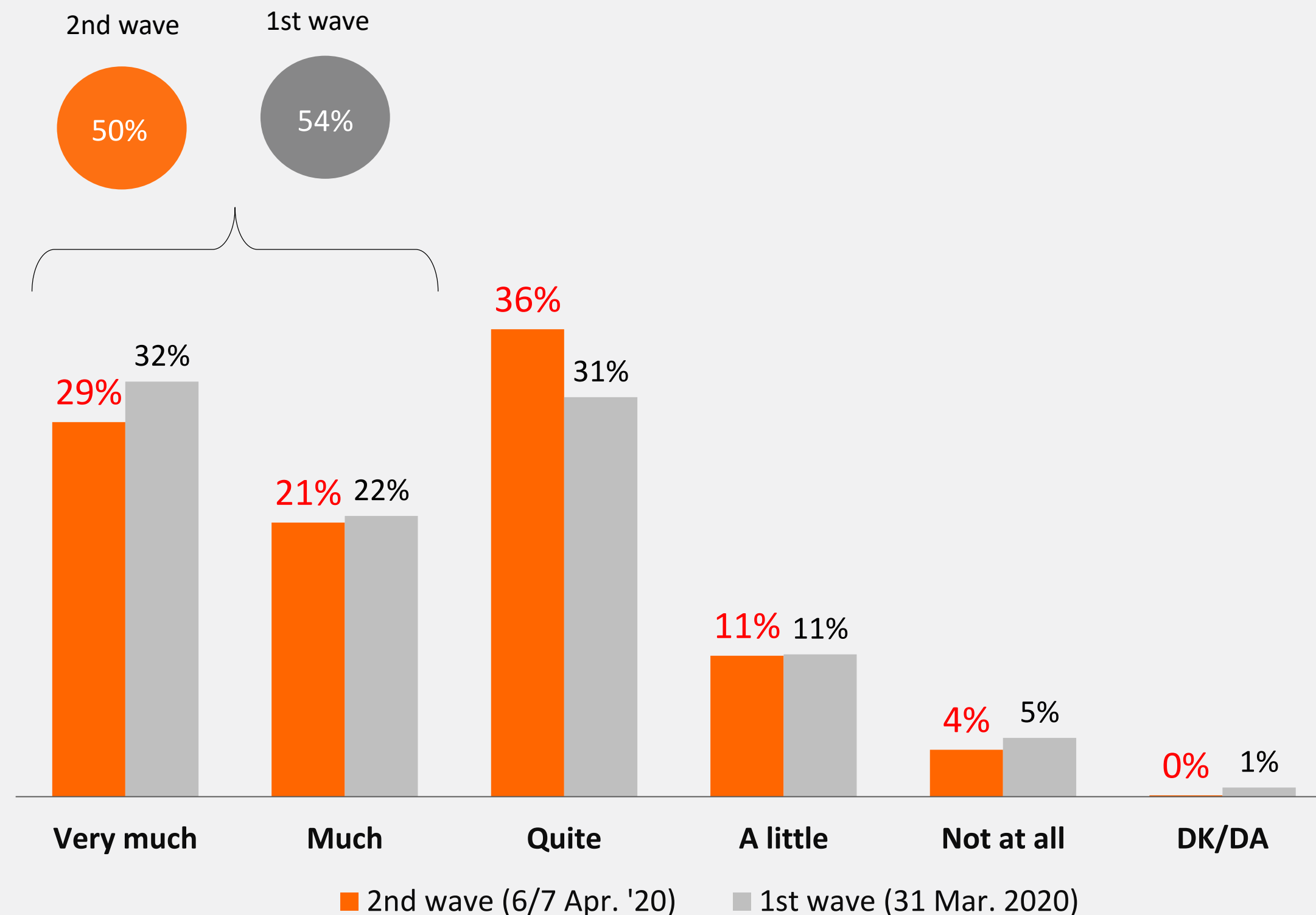


Considering your personal finance in the next 12 months, would you say that...

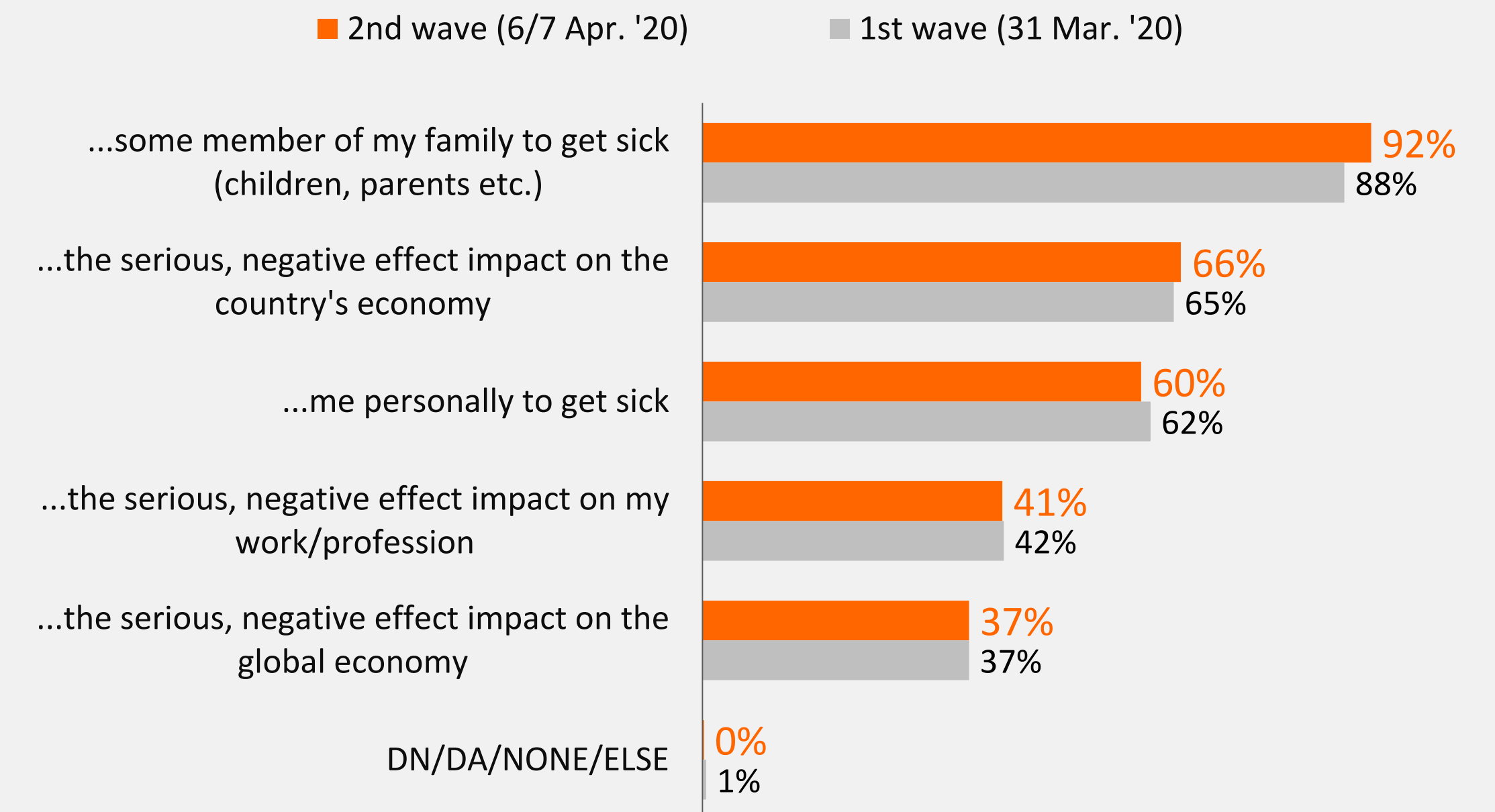
Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



# COVID – 19 concern not yet appeased as fear for both the beloved ones & local economy lie in wait...



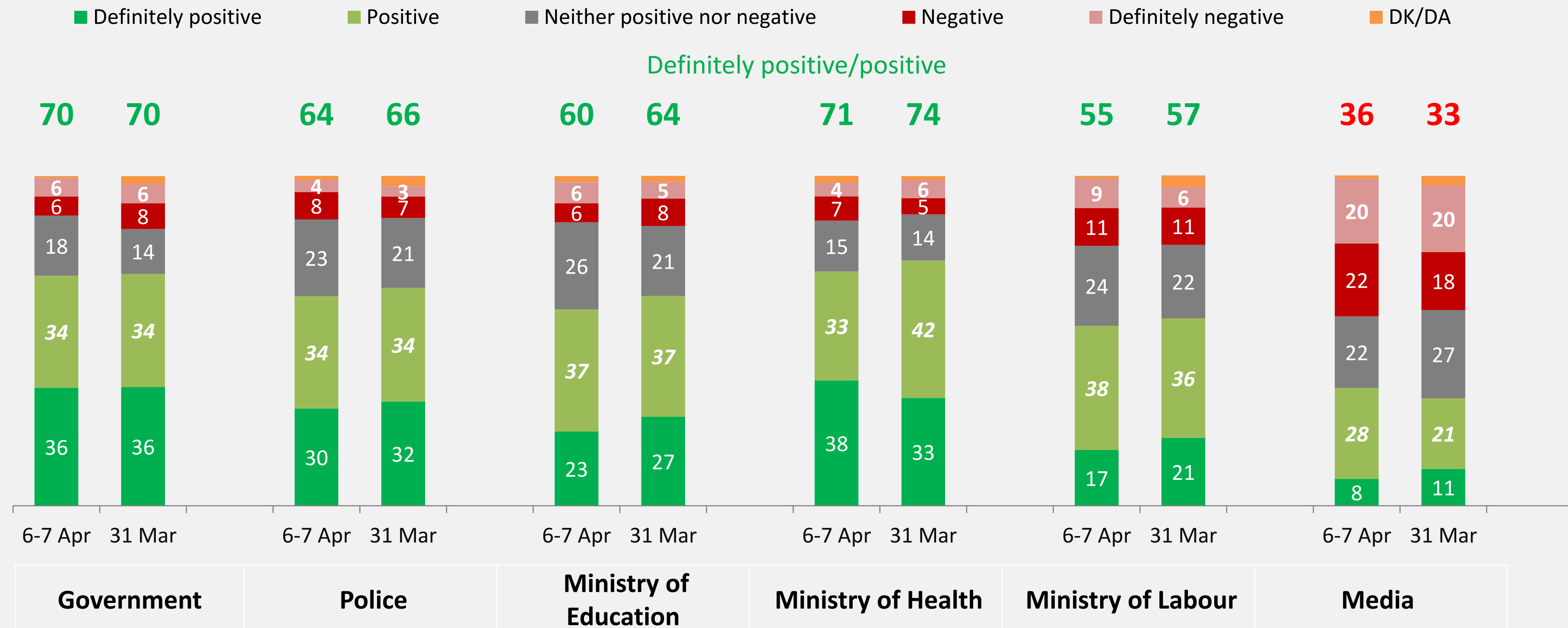
COVID - 19 concern level generally...



COVID - 19 reason of concern (overall)...



# People's trust in institutions remains solid.

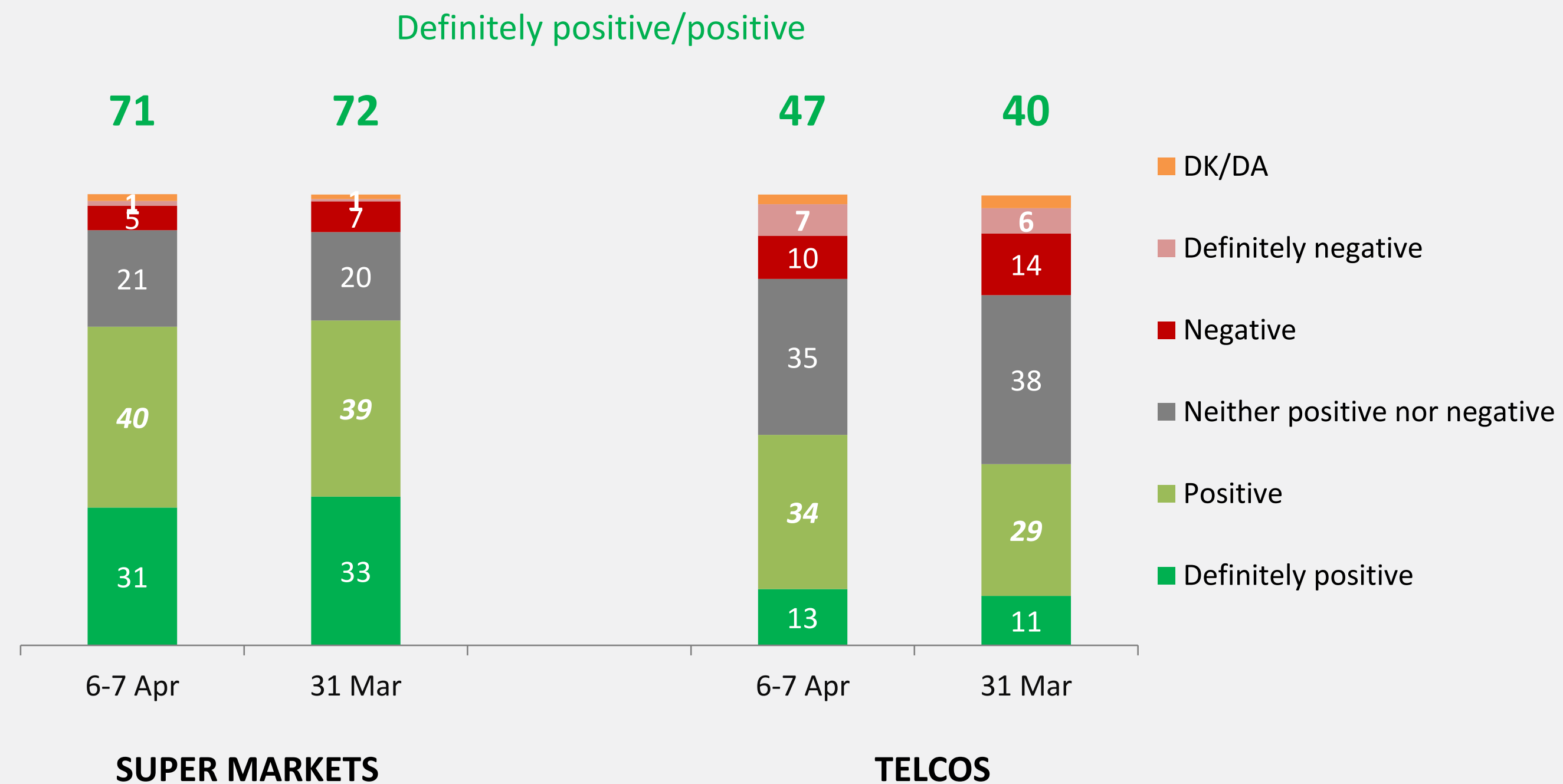


How do you consider the below sectors' management of the Covid-19 emergency?

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



*SMs are pivotal for the community while Telcos' role is significantly enhanced as lockdown continues.*



TELCOS positive evaluation mostly by...

Zers (52%, i112) &  
Baby Boomers (56%, i120)

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

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



*Tracking Shoppers' attitude*



# Physical stores share remain dominant, especially for older in age men. Millennials are e-shoppers @heart.

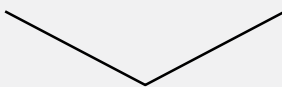


Which of the following better expresses your purchases during lockdown...

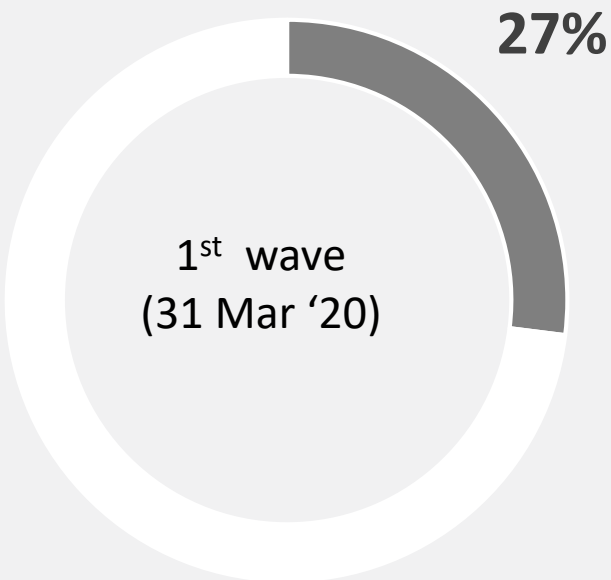
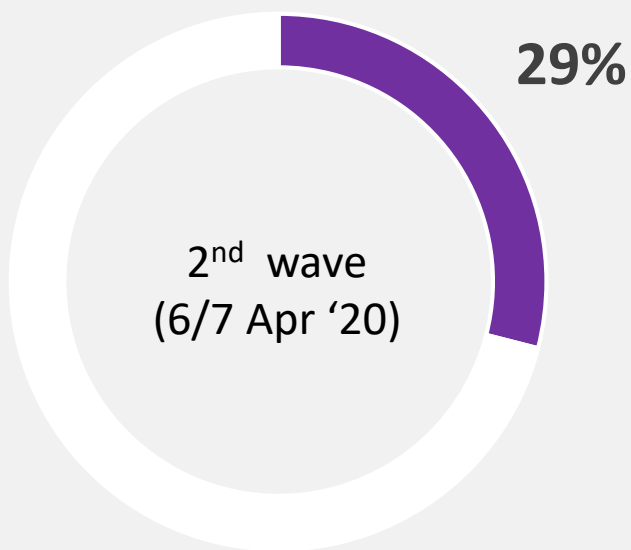
Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



# Shift to e-commerce better crystallized.

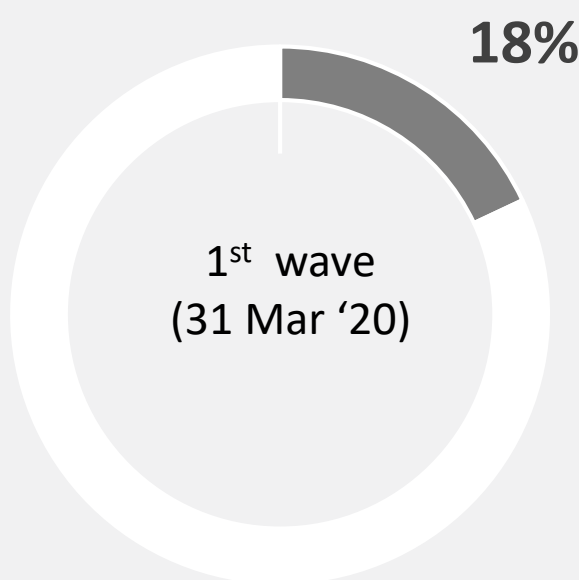
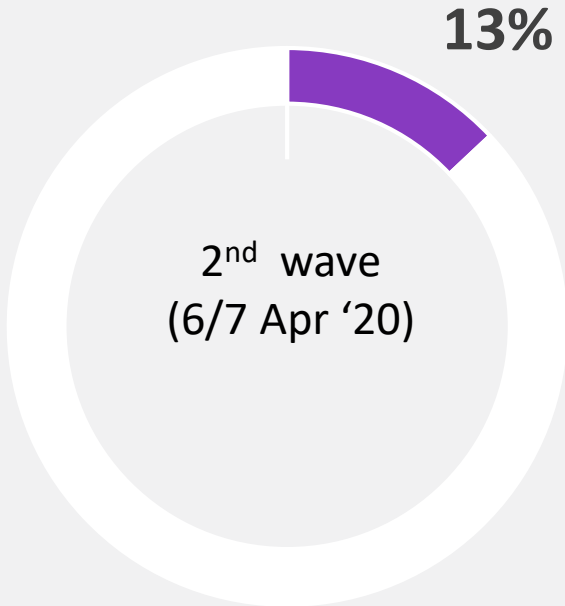


I spend much/quite more...



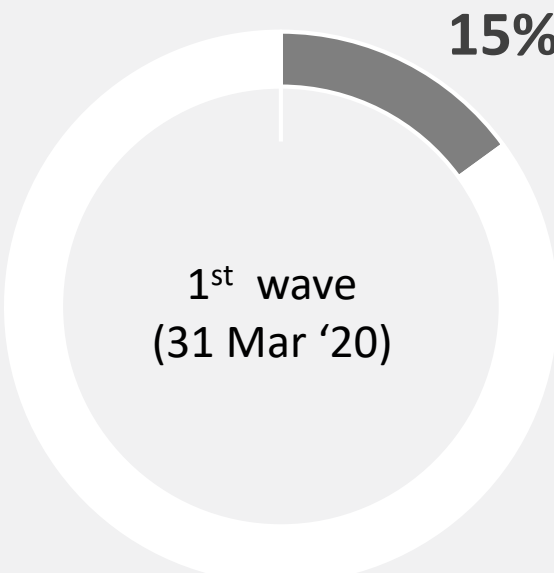
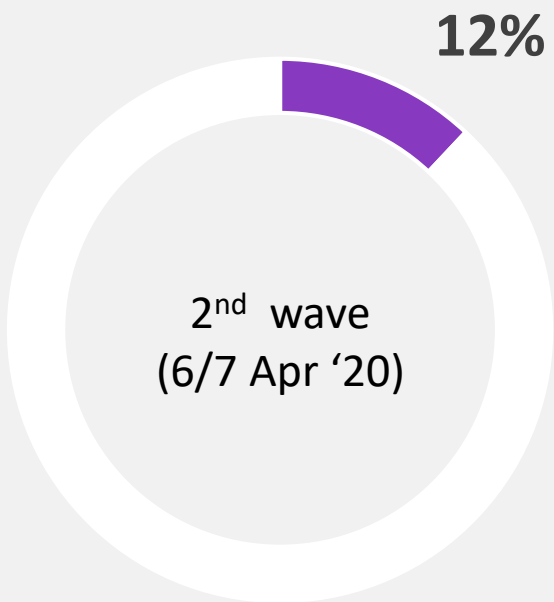
**GEN Z (37%)**  
**MILLENNIALS (35%)**

I spend much/quite less...



**-5pps**

I do not buy online/DK/DA



**-3pps**

Comparing with the pre-pandemic period, concerning your online purchases would you say that...

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2



# Overall satisfaction by the e-shopping experience.

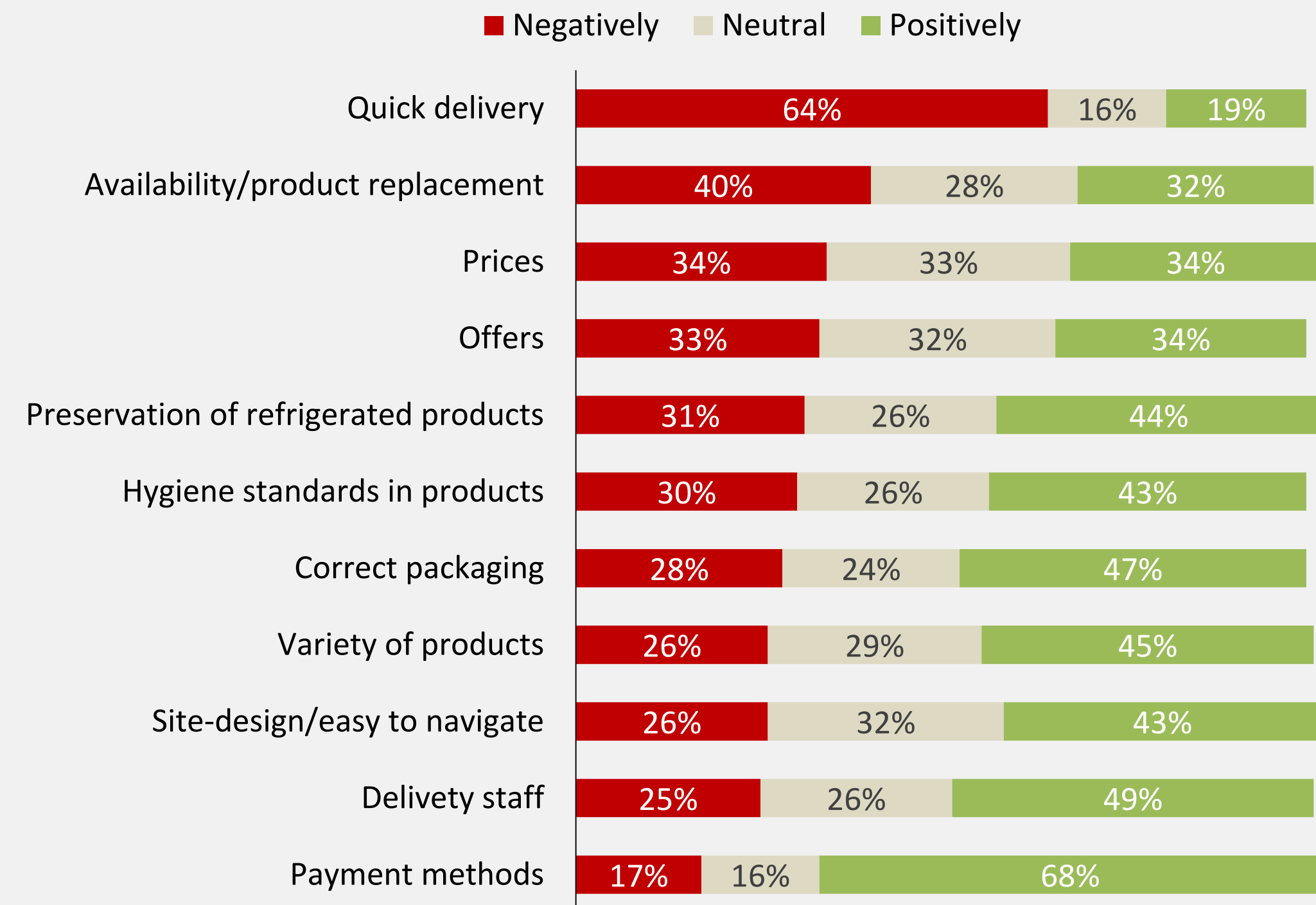
## Room for growth for Supermarkets especially on delivery times.

### I am very satisfied/quite satisfied...



Are you satisfied by the service you received by...?

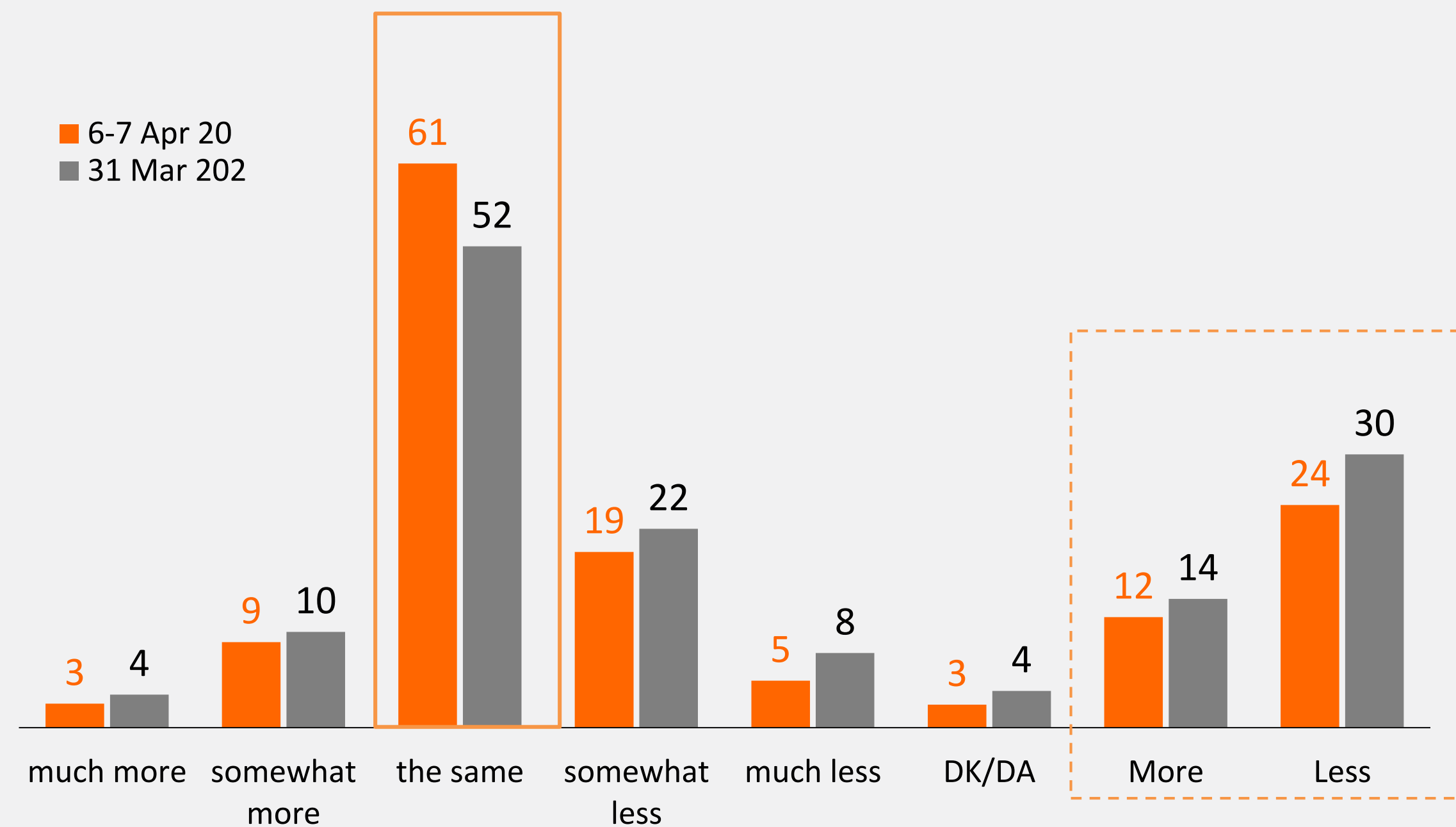
Source: IELKA/ELTURN, April '20



How would you evaluate e-supermarkets concerning....?



*Consumers' expectations about their expenses are in majority considered unchanged compared to the previous period while COVID – 19 shopping habits are here to stay.*



**1/2** of consumers say...

*"I will keep my new shopping habits after getting back to normal"*

Comparing with the period before COVID – 19 outbreak, you would say that after the crisis is over you would spend...

Source: IELKA/ELTURN, April '20

Source: IELKA/ELTURN, April '20

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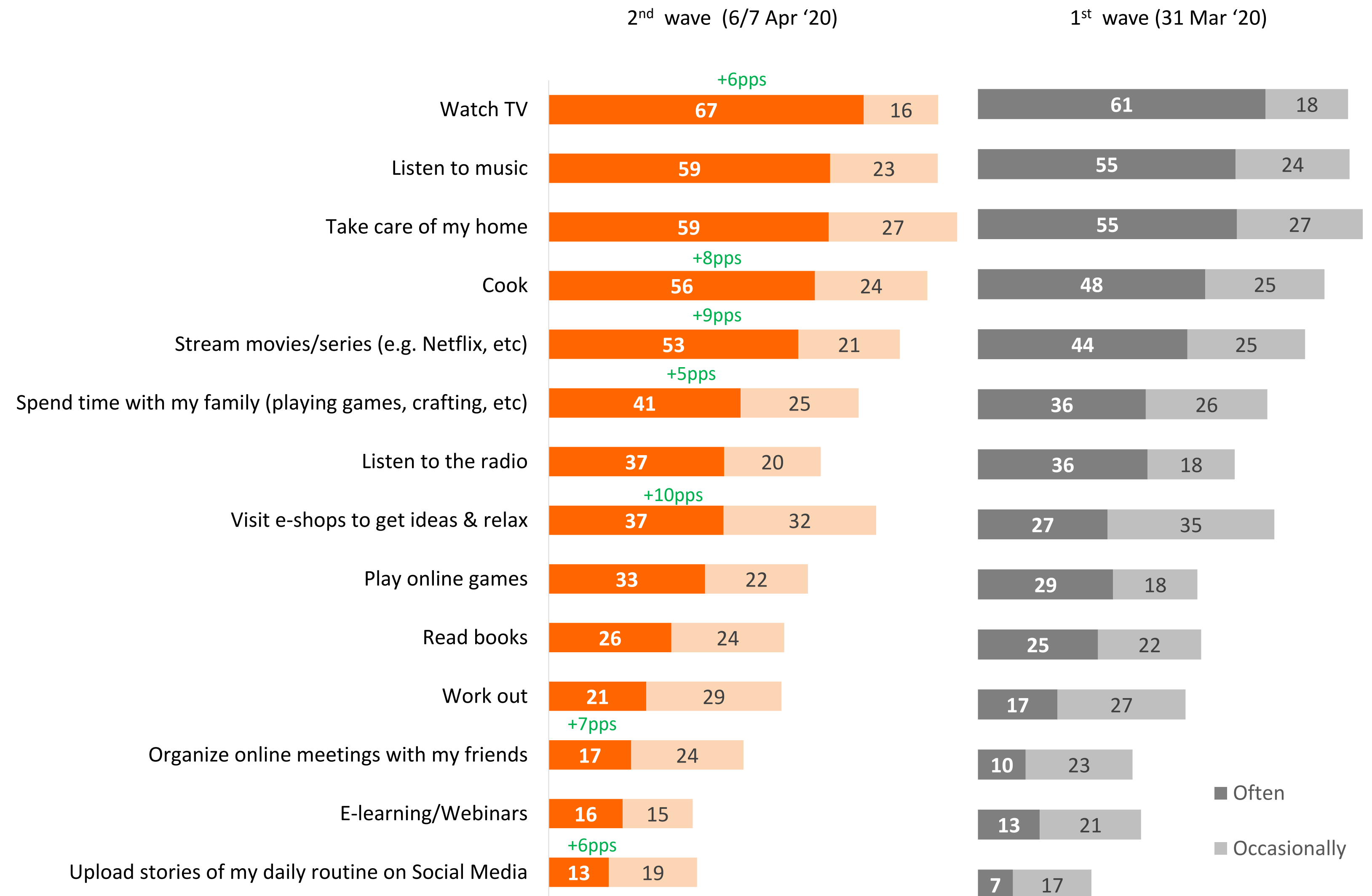


*#stayathome  
...for 4<sup>th</sup> week*



*All activities  
boosted compared  
to a week ago.*

The need to relax, get  
inspired & socialize  
intensified.



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

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*Amidst an “abnormal” normality, life goes on for each generation.  
Working out & streaming are gaining ground in younger ages while listening to music & radio  
is a need for all generations.*



**GEN Z**  
(17-24 y.o.)



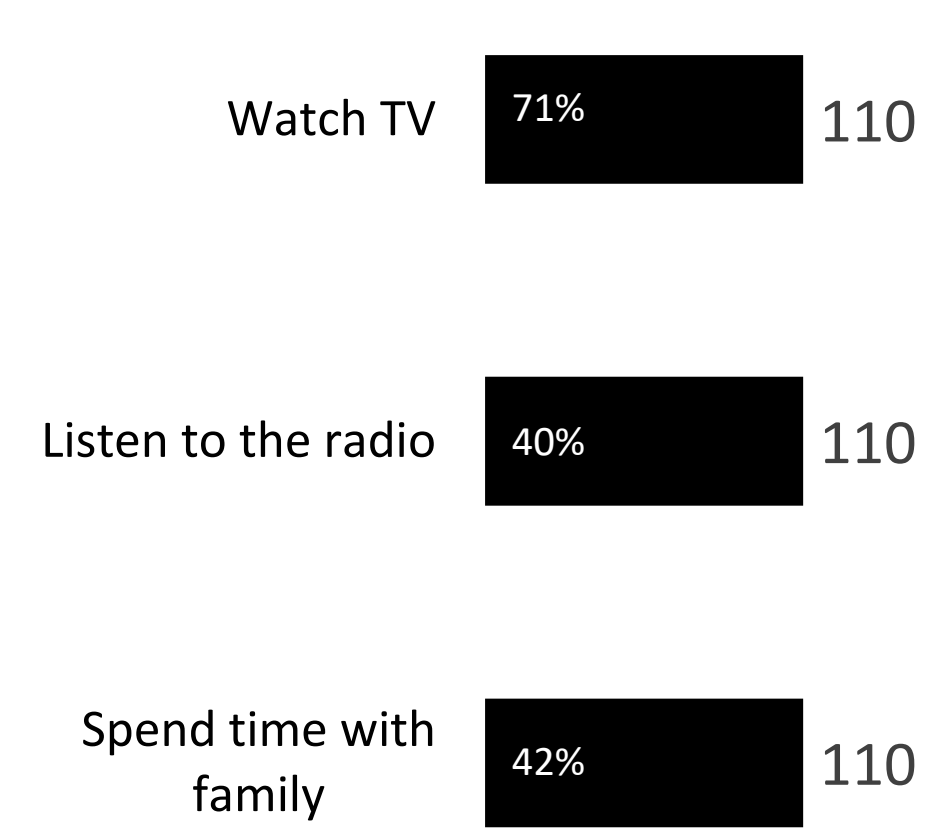
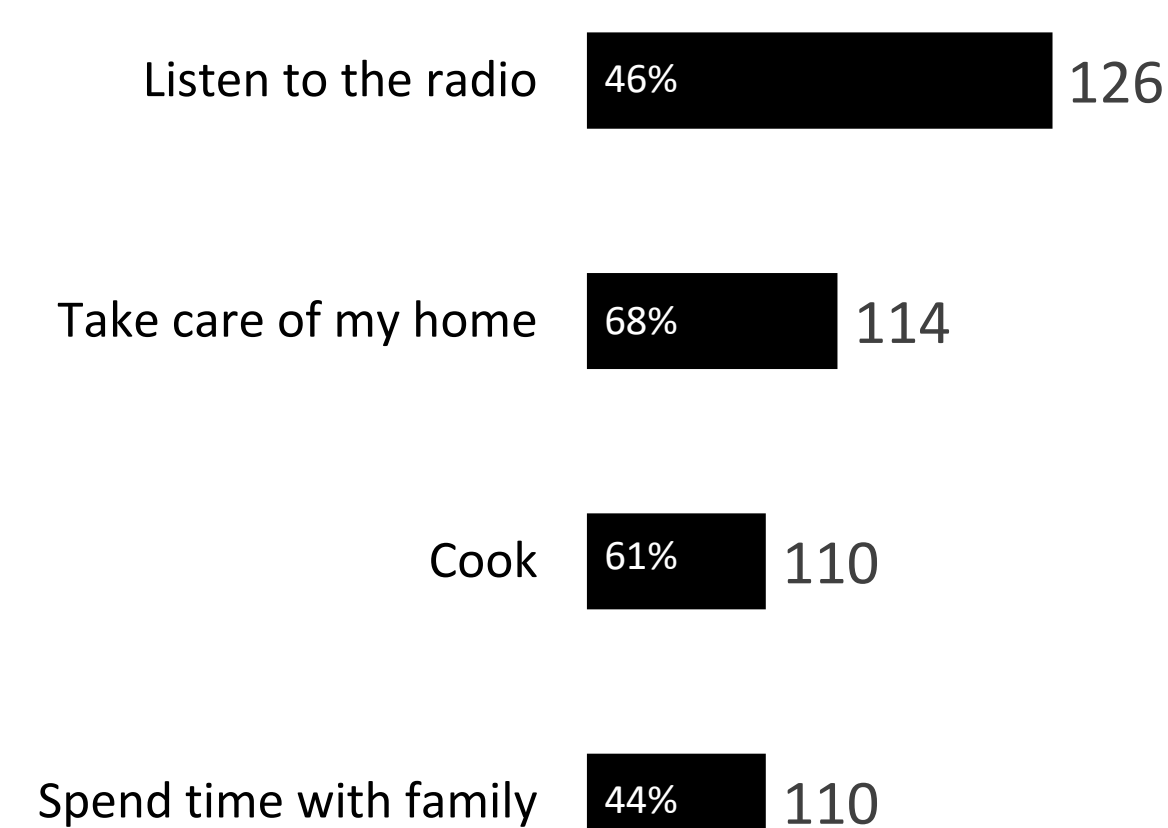
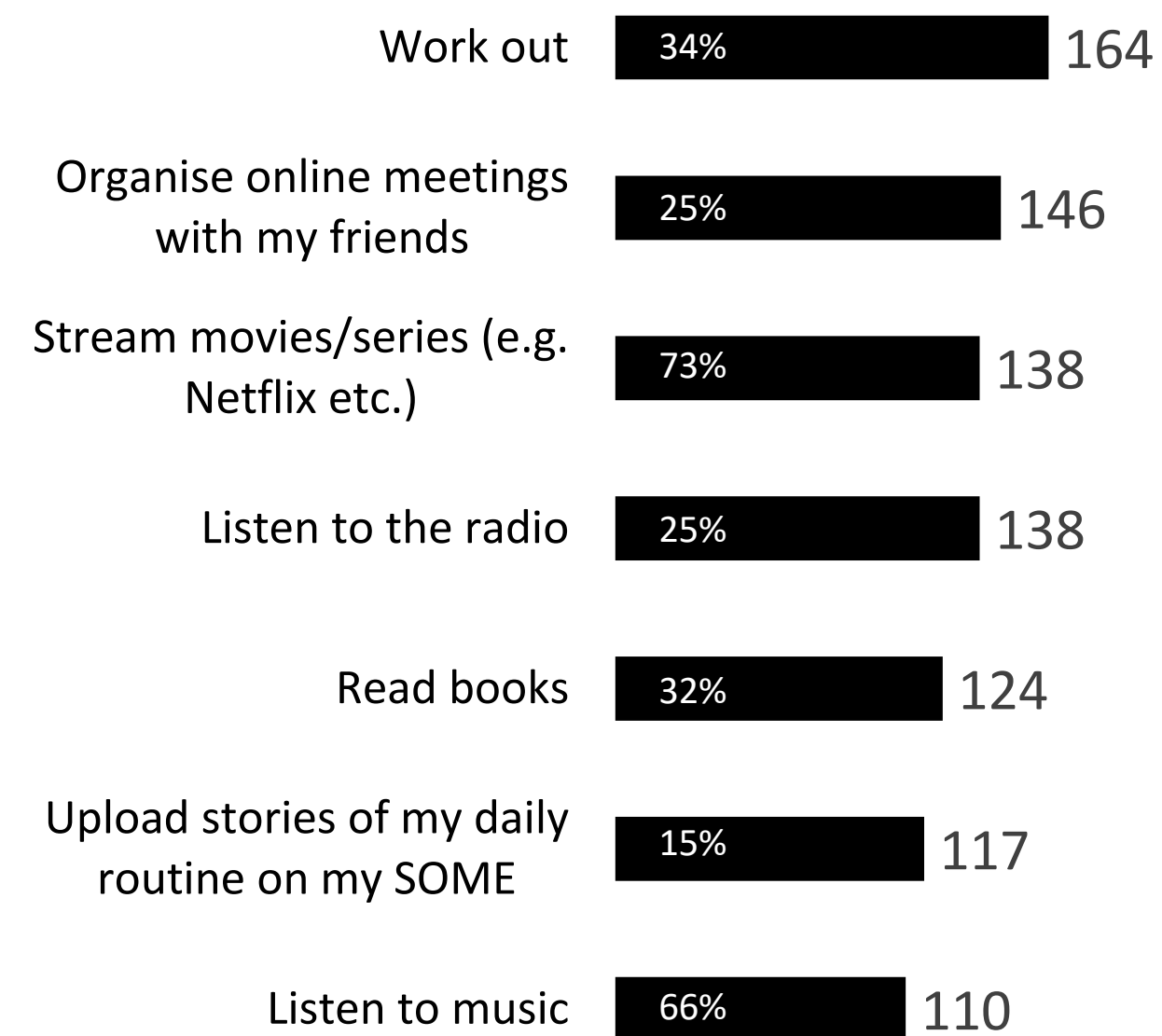
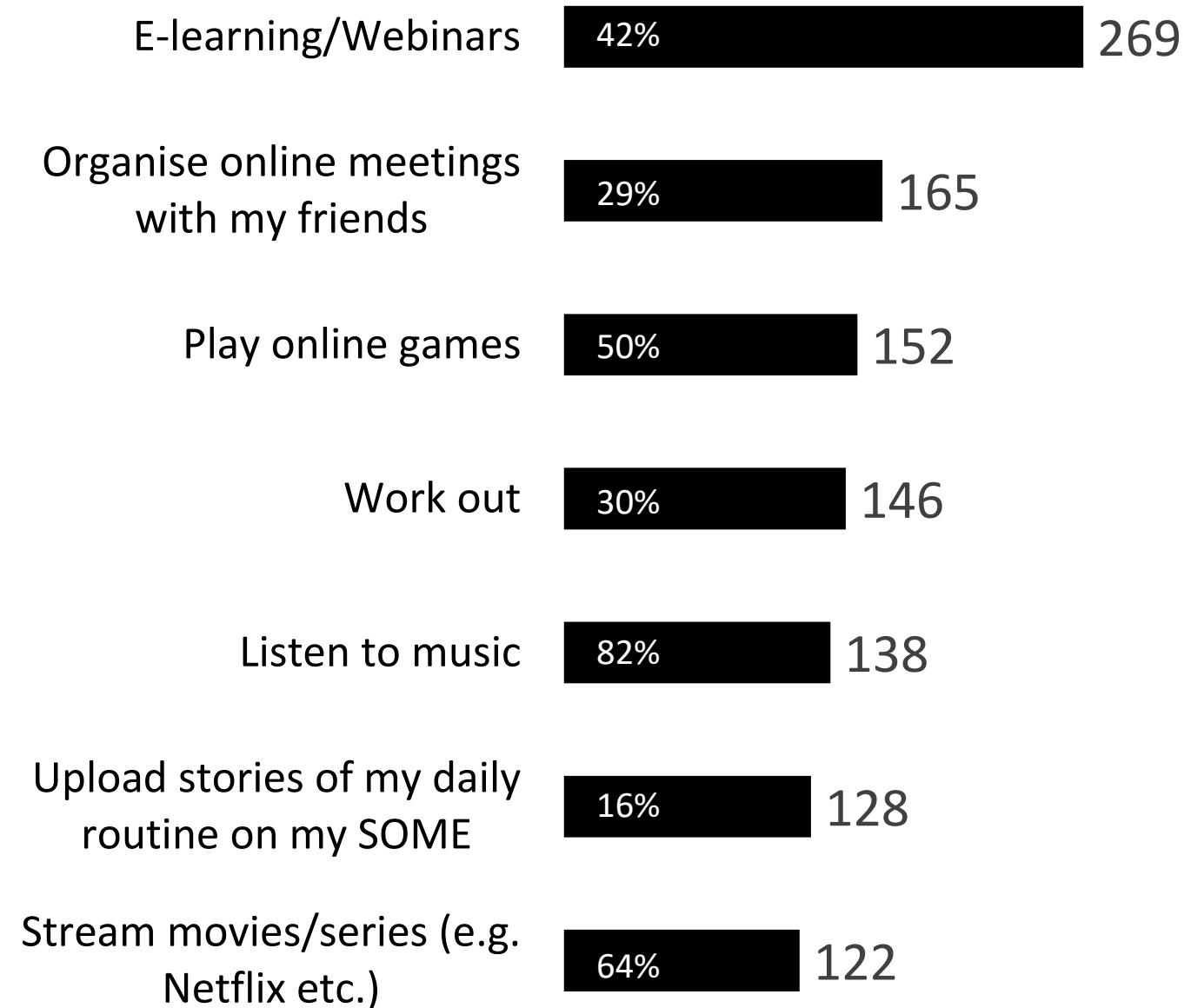
**MILLENNIALS**  
(25-34 y.o.)



**GEN X**  
(35-54 y.o.)



**BABY BOOMERS**  
(55+ y.o.)



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

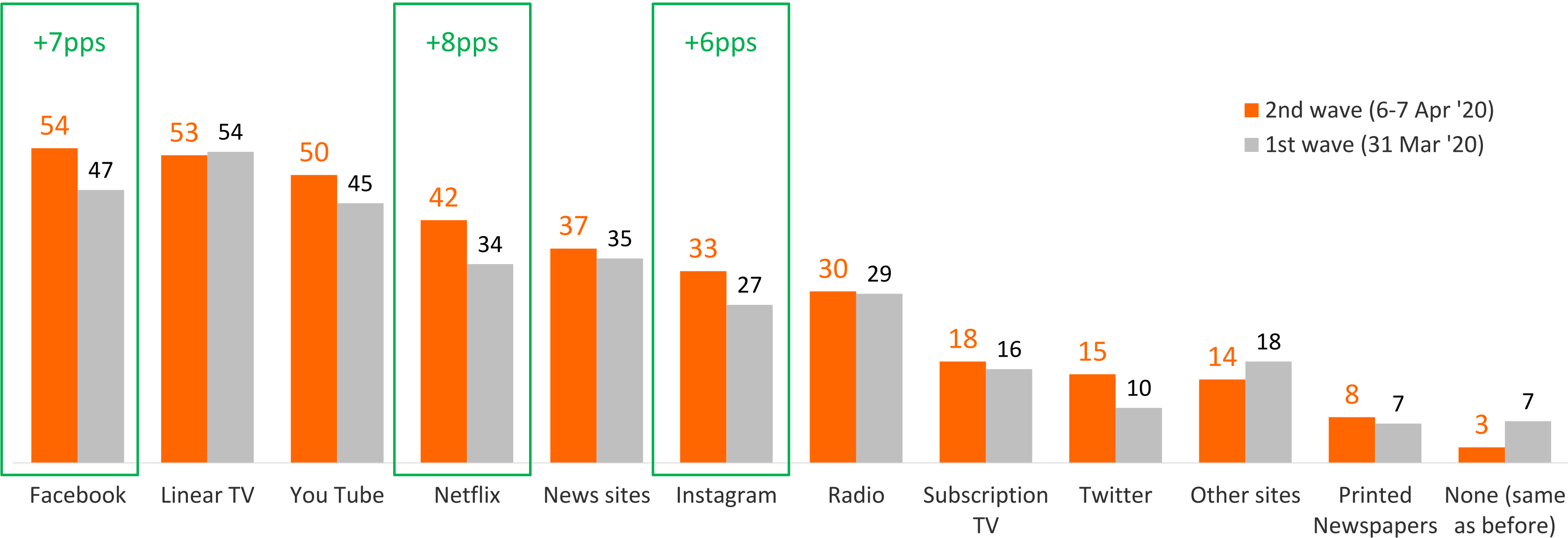
Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2

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*Consumption of media remains high...*

Netflix, SoMe present the highest increase vs previous wave.



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 2



*...according to each generations' familiar touchpoints.  
Streaming is boosted in youngsters while TV, Press & Radio increases for more mature ages.*



**GEN Z**  
(17-24 y.o.)

Netflix 67% 159

Instagram 49% 148

YT 57% 116



**MILLENNIALS**  
(25-34 y.o.)

Netflix 59% 142

YT 57% 110



**GEN X**  
(35-54 y.o.)

Subscription TV 25% 143

NPs 11% 135

Twitter 14% 130

News Sites 38% 123

Radio 36% 120



**BABY BOOMERS**  
(55+ y.o.)

Watch TV 74% 139

NPs 11% 138

Subscription TV 21% 118

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 2

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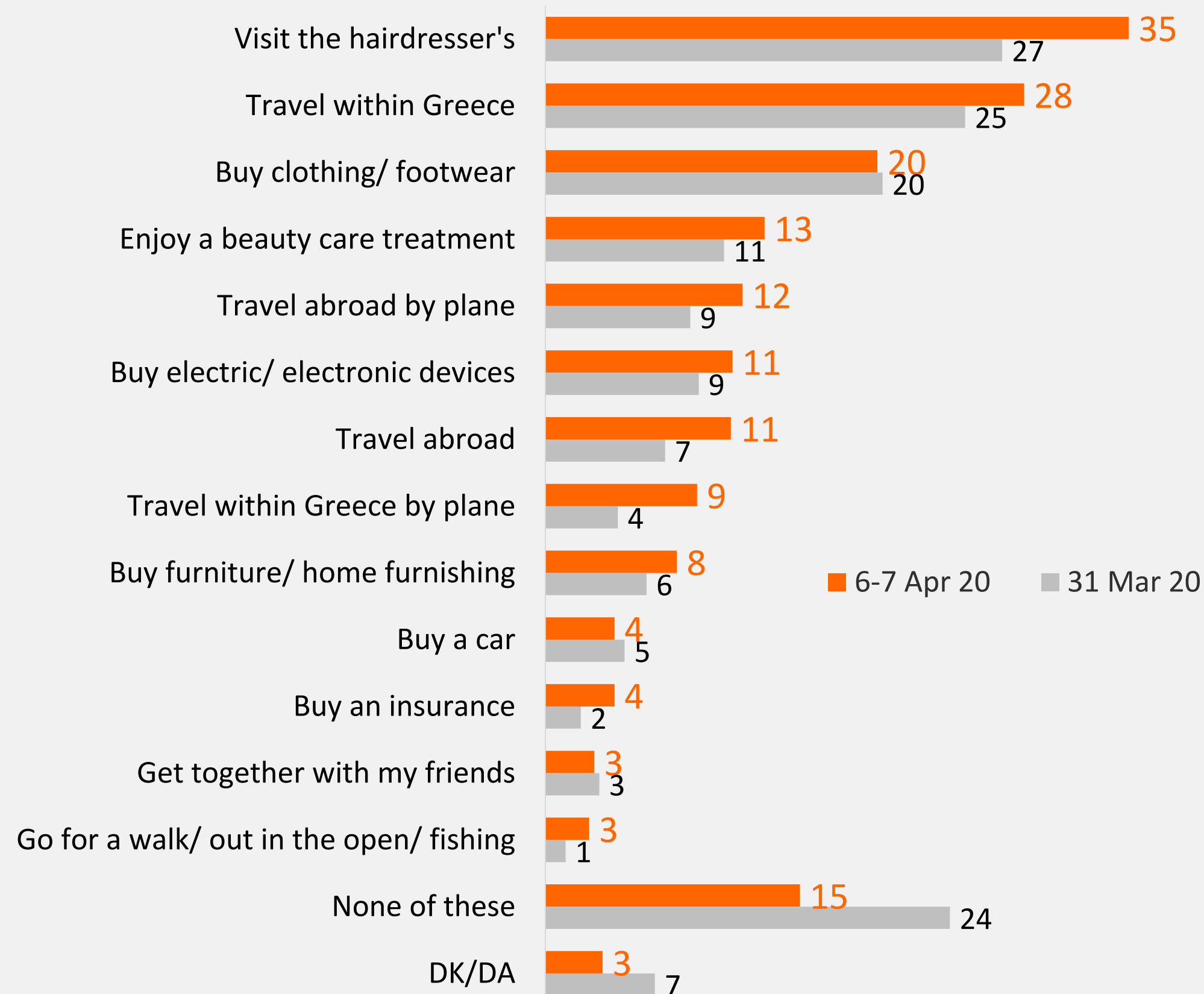


**When this is all over....**



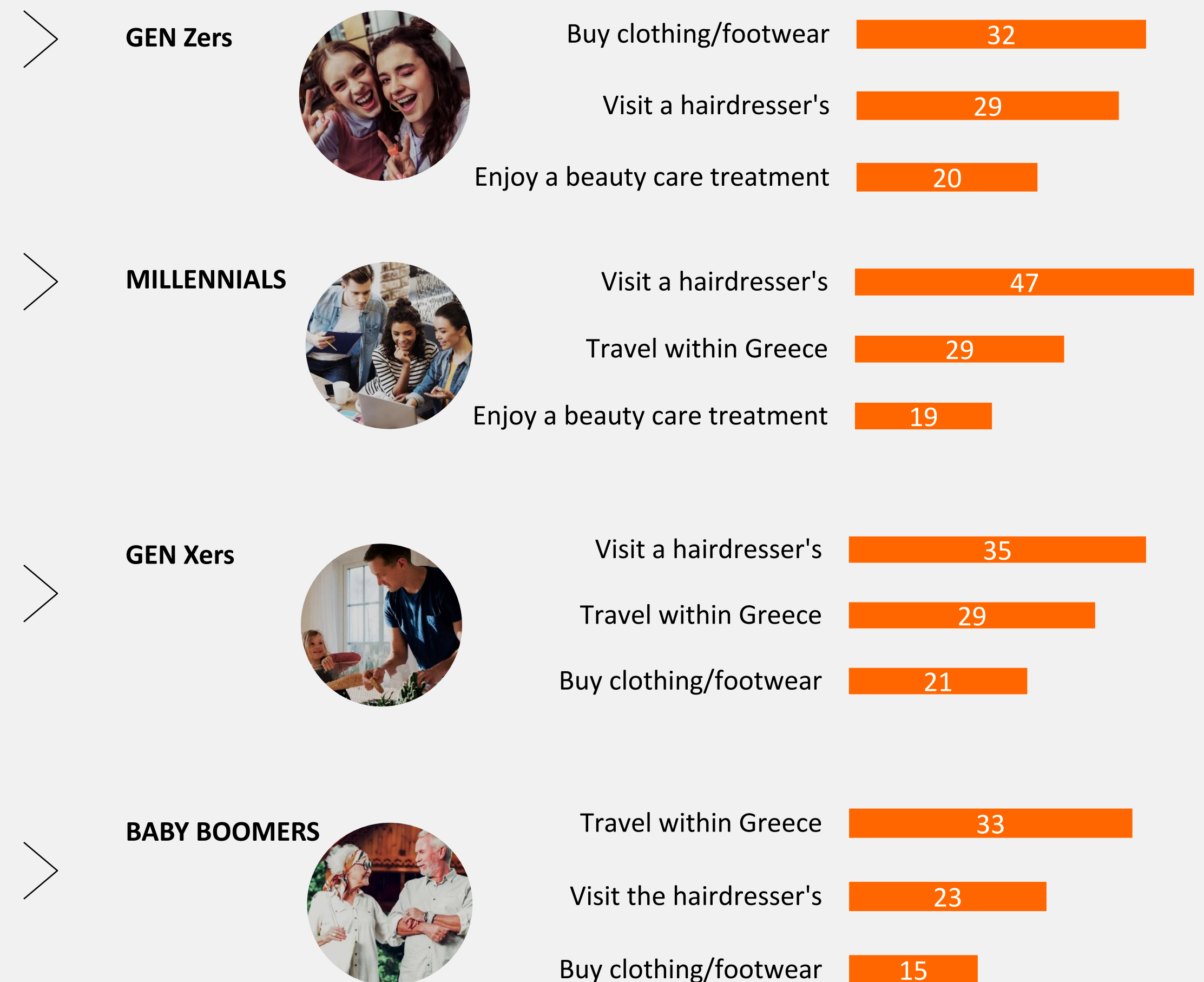


# Our longing for getting back to the new normal is obvious in the increasing trend of all activities.



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

Source: Dentsu Aegis Network Hellas/MRB Hellas, Tracking Study, Wave 2

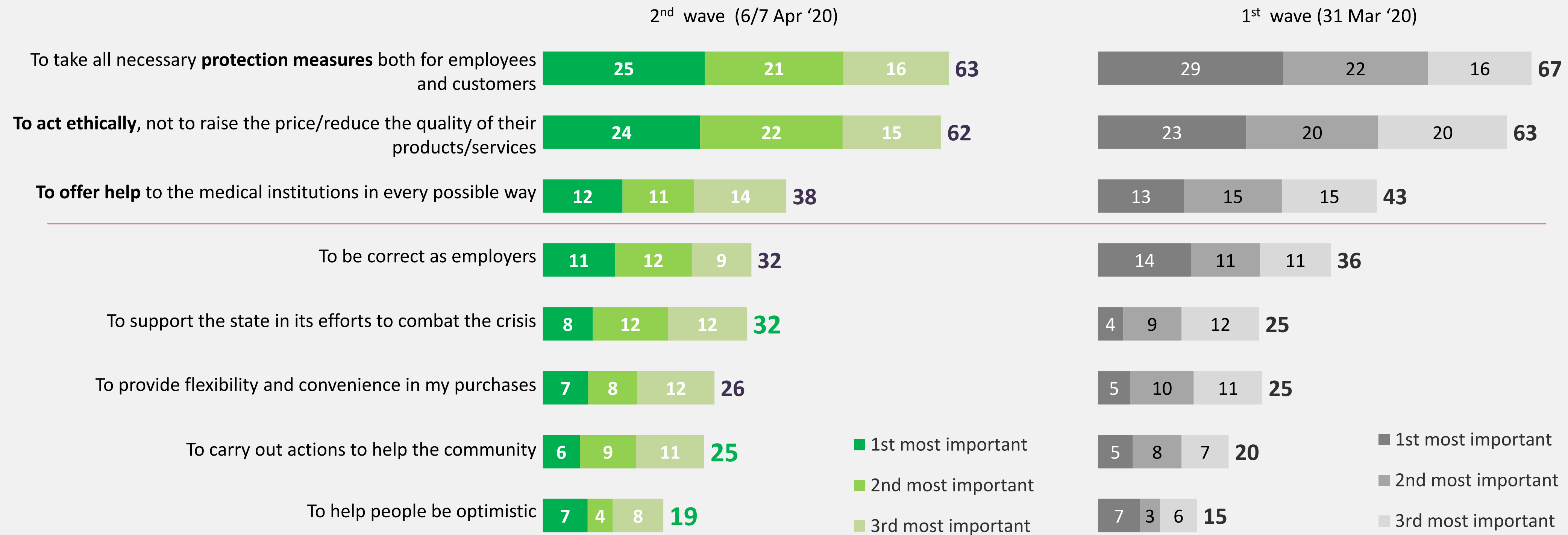
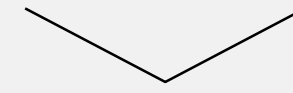




# *Expectations from Brands*



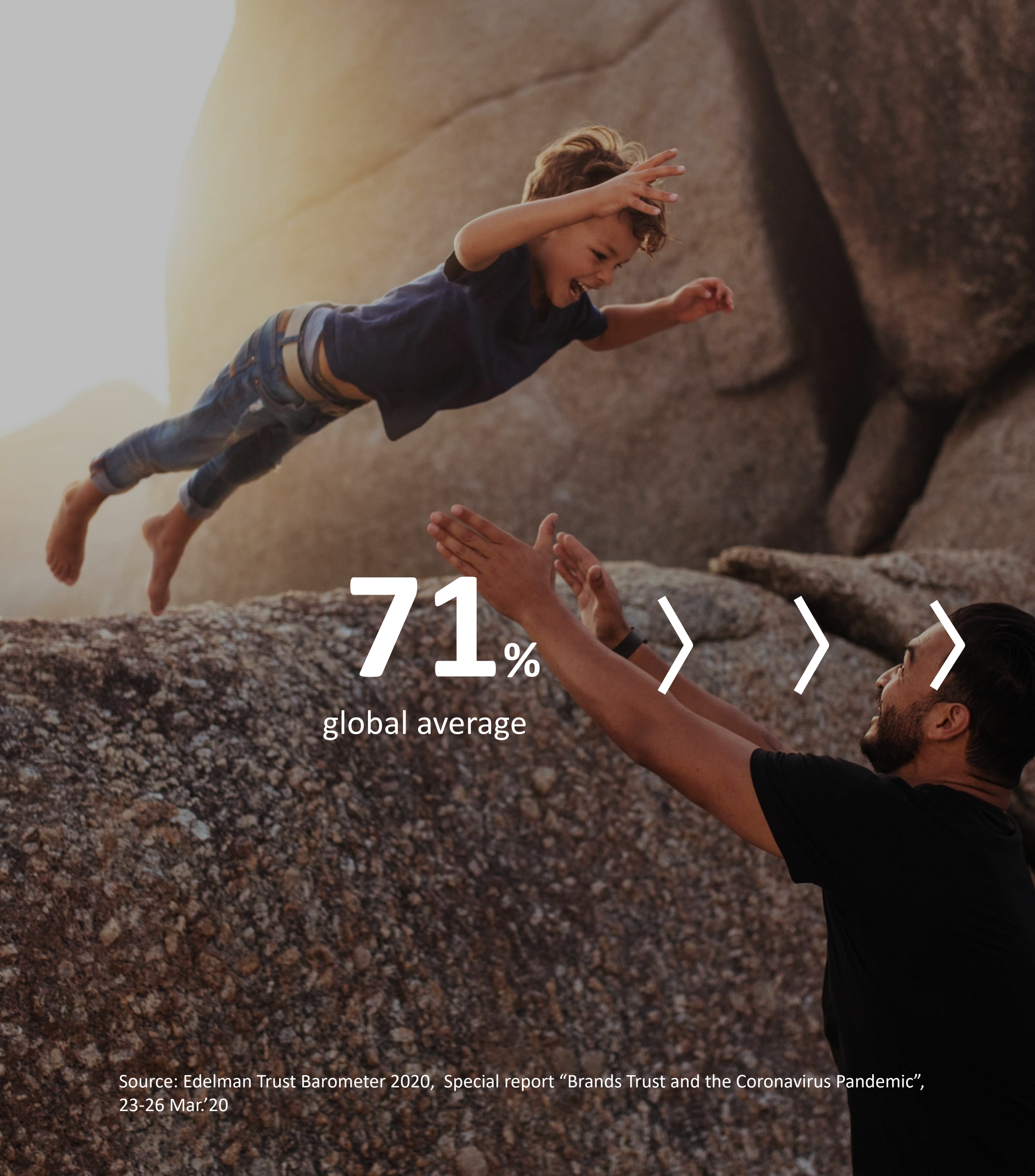
# *Being ethical is a red line for brands. Community contribution & sensing people's need for optimism emerge.*



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 2

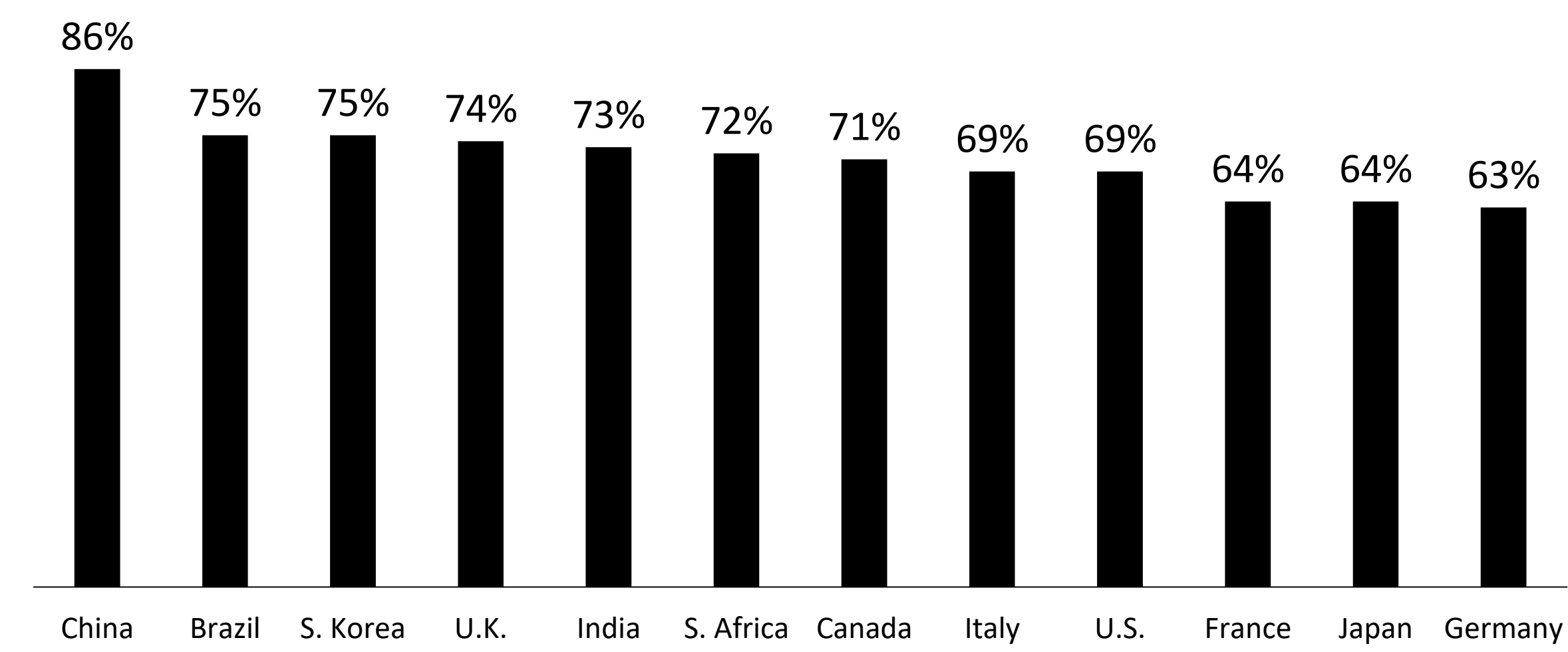
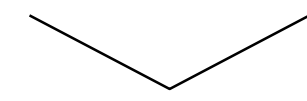




71%  
global average



*If purpose is brands' northern star,  
Trust is the compass to the Future.*



Brands and companies that I see placing their profits before people during this crisis **will lose my trust forever.**

Source: Edelman Trust Barometer 2020, Special report “Brands Trust and the Coronavirus Pandemic”, 23-26 Mar.’20



Brands are navigating their  
way to the new World...

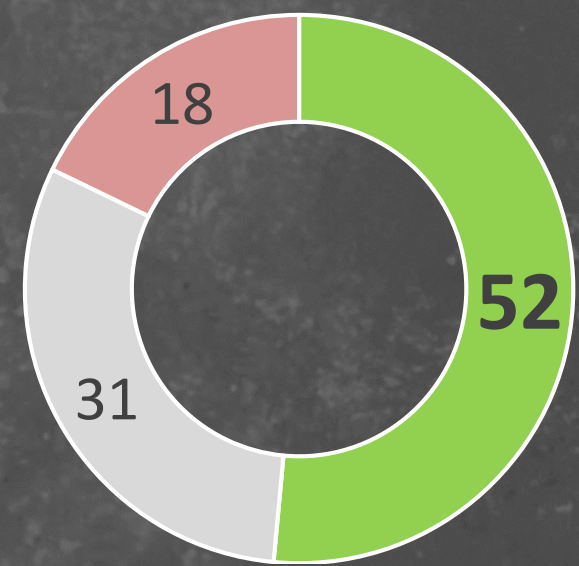
*“We cannot choose the challenges we  
face, but we can choose how we  
respond to them.”*

Epictetus

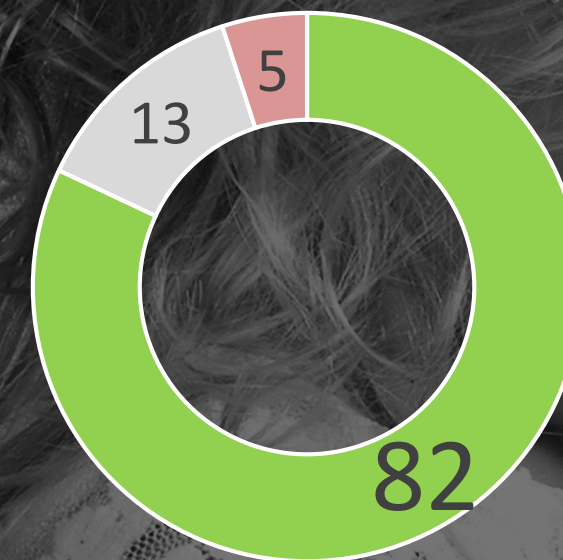




*...they are aware that consumers all over the world wish them to keep “talking”...*



**52%** approve of brands running "normal" advertising campaigns (which aren't related to coronavirus)



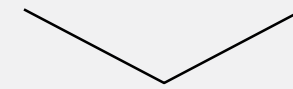
**82%** approve of brands running advertising which shows how they are responding to coronavirus or helping customers

**77%** approve of brands to provide entertaining content

**89%** approve of brands to provide practical info / tips which help people to deal with the situation



*...they unite with increasing voices of solidarity, empathy & “thank you” globally.*



## TRENDING THEMES

### Emerging Themes

#ClapForOurCarers + 716.6%  
#ThankYouNHS + 420.8%  
#lightblue + 319.4%  
#StayHomeSaveLives + 95.5%

### Decreasing Themes

#COVID – 54.4%  
#COVID -19 – 51%  
#IndiaFightsCorona – 31.8%  
#QuedateEnCasa – 31.8%  
#COVID2019 – 28,7%

### New Themes

#ClapForNHS  
#StayAtHome  
#ClapForCarers  
#GymnasticsWithMax  
#Staysafe

## GLOBAL MENTIONS

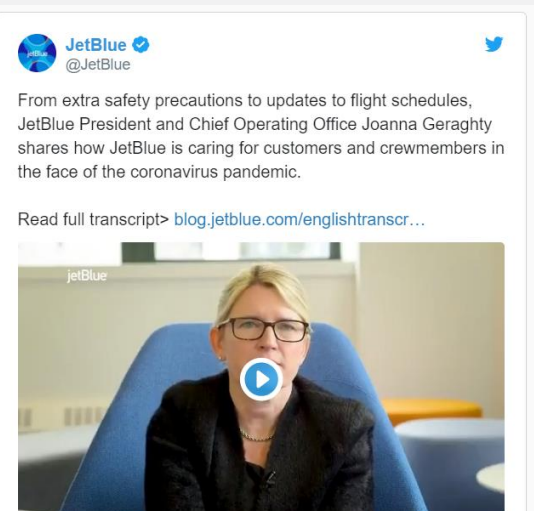
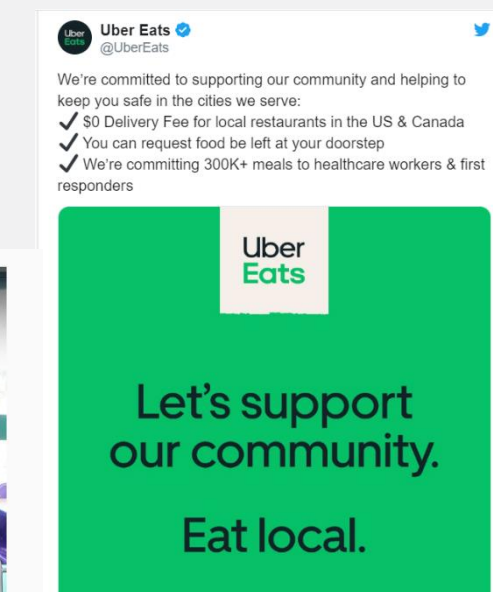
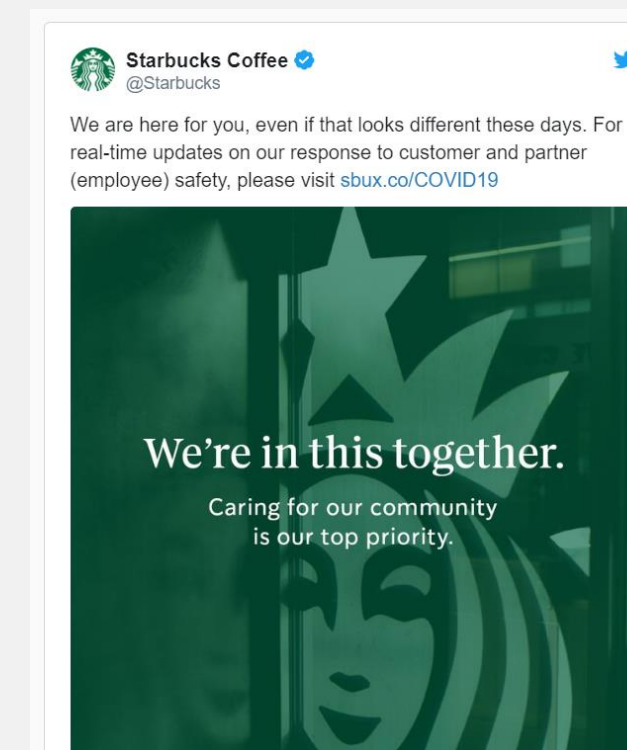
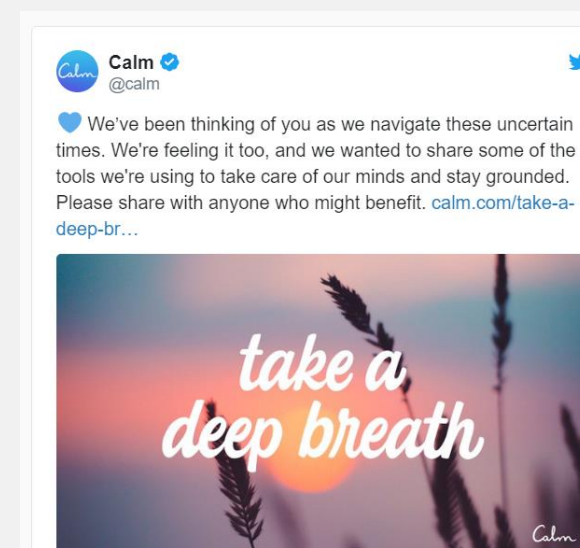
of covid-19 on social media, blogs, news, sites & forums

134.5 m

↓ -21,5%

Compared with previous period 171.4m

*... Global brands adapt*





*...in Greece as well.*

### ✓ Through CSR initiatives

From large monetary support, healthcare resources and food donations, to creating essential products, they support healthcare.

### ✓ Through entertaining & helpful content

Home entrainment series content to keep consumers active is trending..

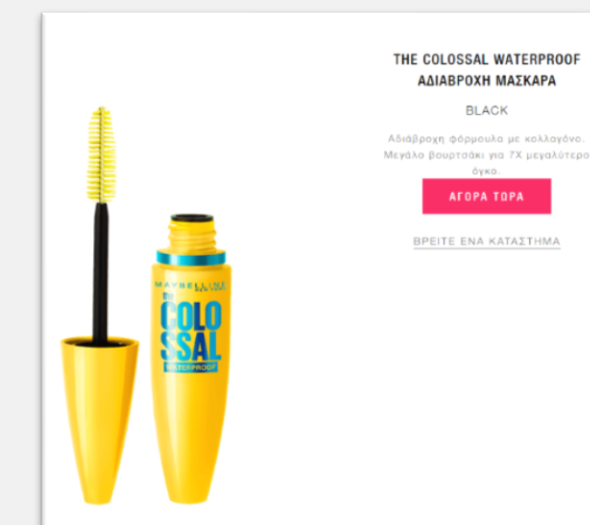
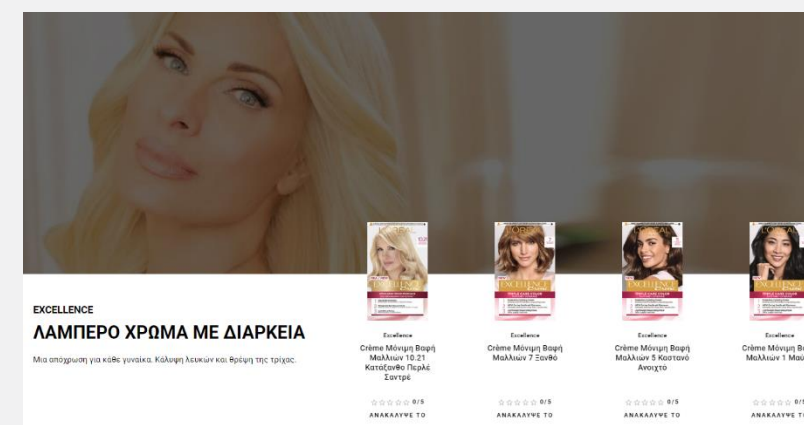
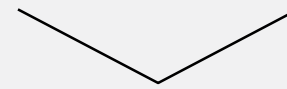
**On the consumer side, people become increasingly demanding creating opportunities for brands.**

### ✓ High demand for DIY products

Now is the time for brands to promote their DIY products for home consumption.

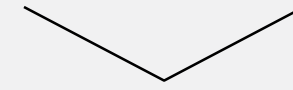
### ✓ Need for educational content for non tech–savvy users

With online shopping on the rise, there is a need to inform non tech-savvy users on how to use online shopping platforms.





# *Things to remember...*



## **1. Show up and do your part**

**Now is not the time to disappear**, but to show up and use all your resources and creativity to make a difference.

## **3. Solve, don't sell**

All efforts should be focused on finding appropriate and meaningful solutions to the problems people are facing today. **To make things of value**, re-purpose your production lines because this is not the place for branding.

## **2. Don't act alone**

There is strength in collaboration. **To give people things of value** during this crisis requires a joining of forces with others, especially institutions. Community is the compass, conviction is the way to speak.

## **4. Communicate with emotion, compassion and facts**

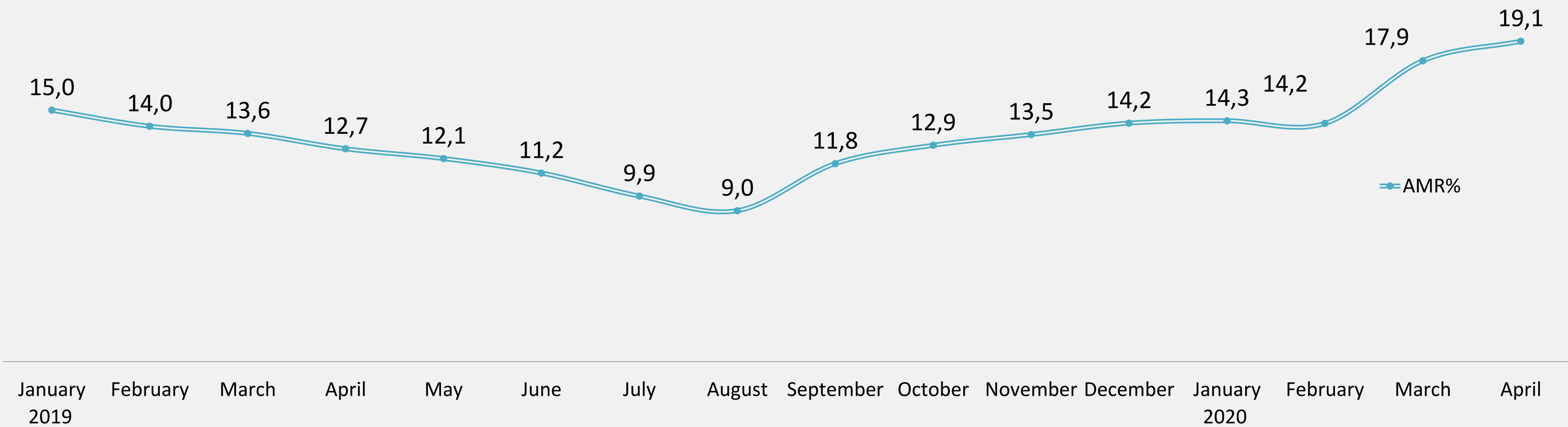
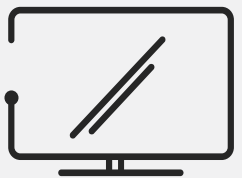
**Say things of value** to inform, educate and calm people. This is your fingertip of help and solidarity when everything is uncertain and mundane.



# *Media Update*



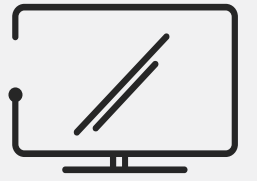
# TV viewership is increasing.



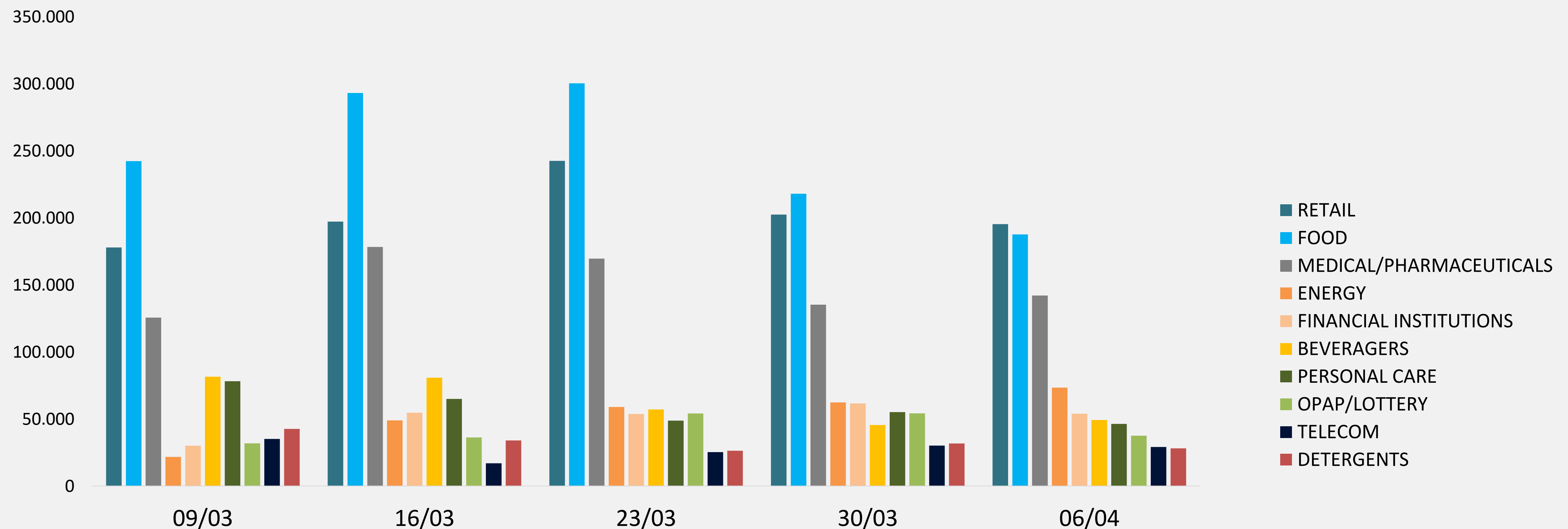
Source: Nielsen Audience Measurement /Media Services



*During the last week, Retail has claimed #1 position in advertising volume, closely followed by the Food category*



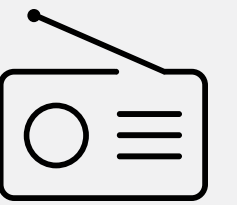
Top 10 categories per week (grps\*secs)



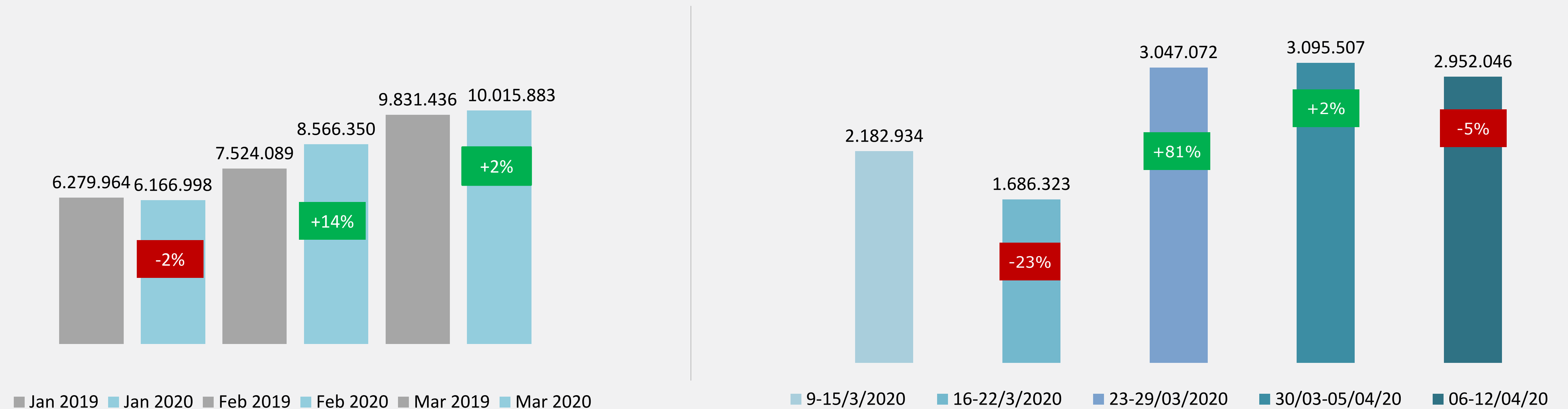
The highest growth comes from the **Energy** category followed by **Pharmaceuticals** which however seem to stabilize during the last two weeks.



# Radio activity has a small decrease during the last week after 2 weeks of growth

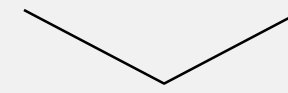
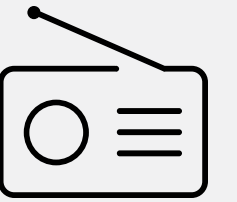


Radio Total Market (sec) - Athens, Salonica & Rest of Greece

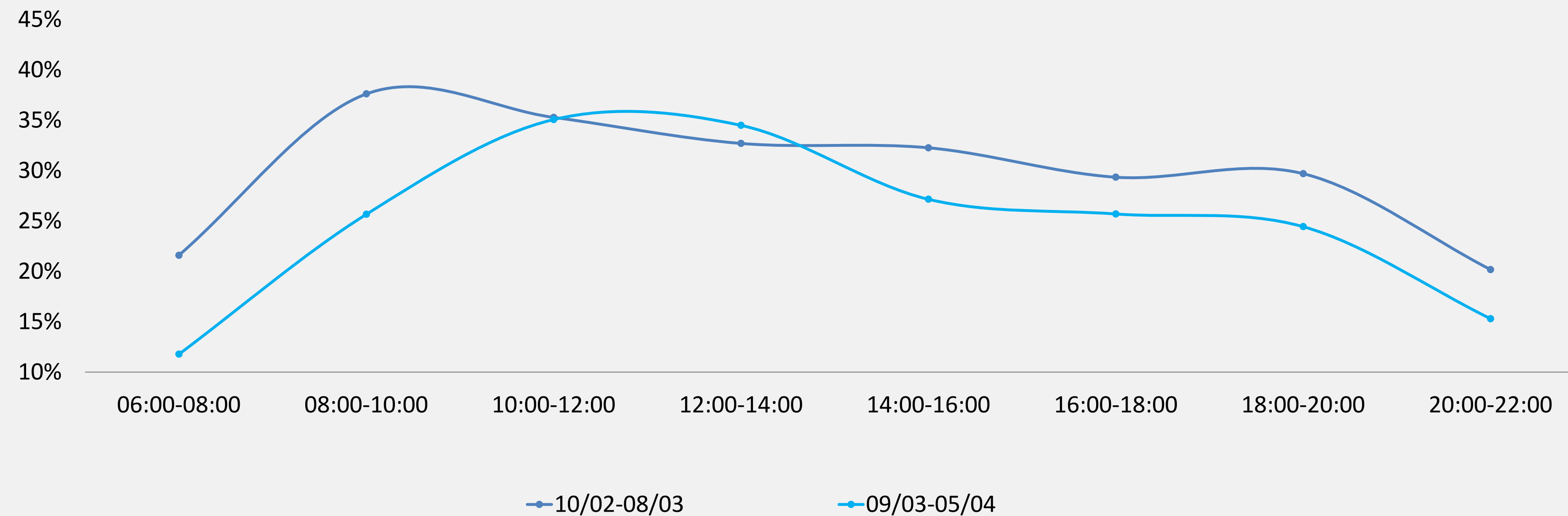




*There is a decreasing trend for most of the time zones...*



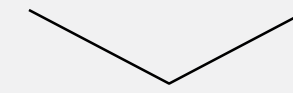
Average Listenership per time zone



... although 10:00-14:00 zone has increased its listenership being the COVID-19 top radio zone



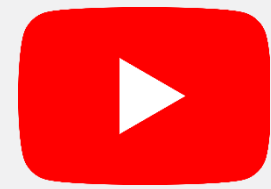
# *Usage of digital platforms boosted during March.*



Digital Platforms Usage MoM% – March vs February

Google

+16,6%



+19,26%



+80,4%



+24,2%



+36,5%  
app downloads



+14,7%



+16,3%  
app downloads

**NETFLIX**

+50,93%



+29,4%

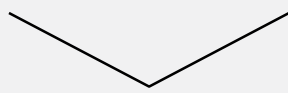


+25,5%  
app downloads

All Online platforms, Social and Video have increased a lot in terms of usage or app downloads during last month

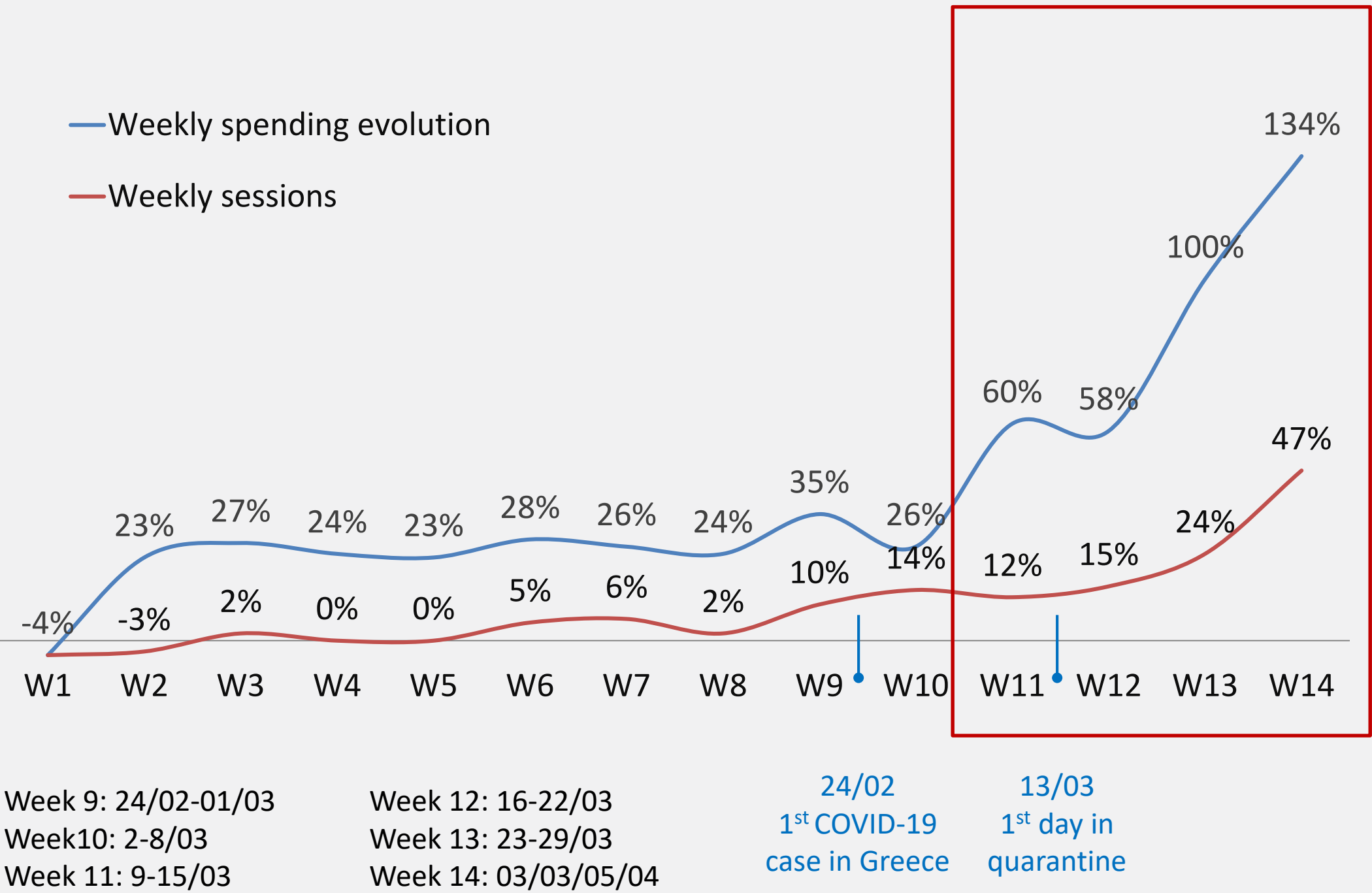


# e-Commerce thrives driven by Entertainment, Technology & Sports/Hobbies ...while the last two weeks the Kids/Toddlers category increases significantly due to Easter



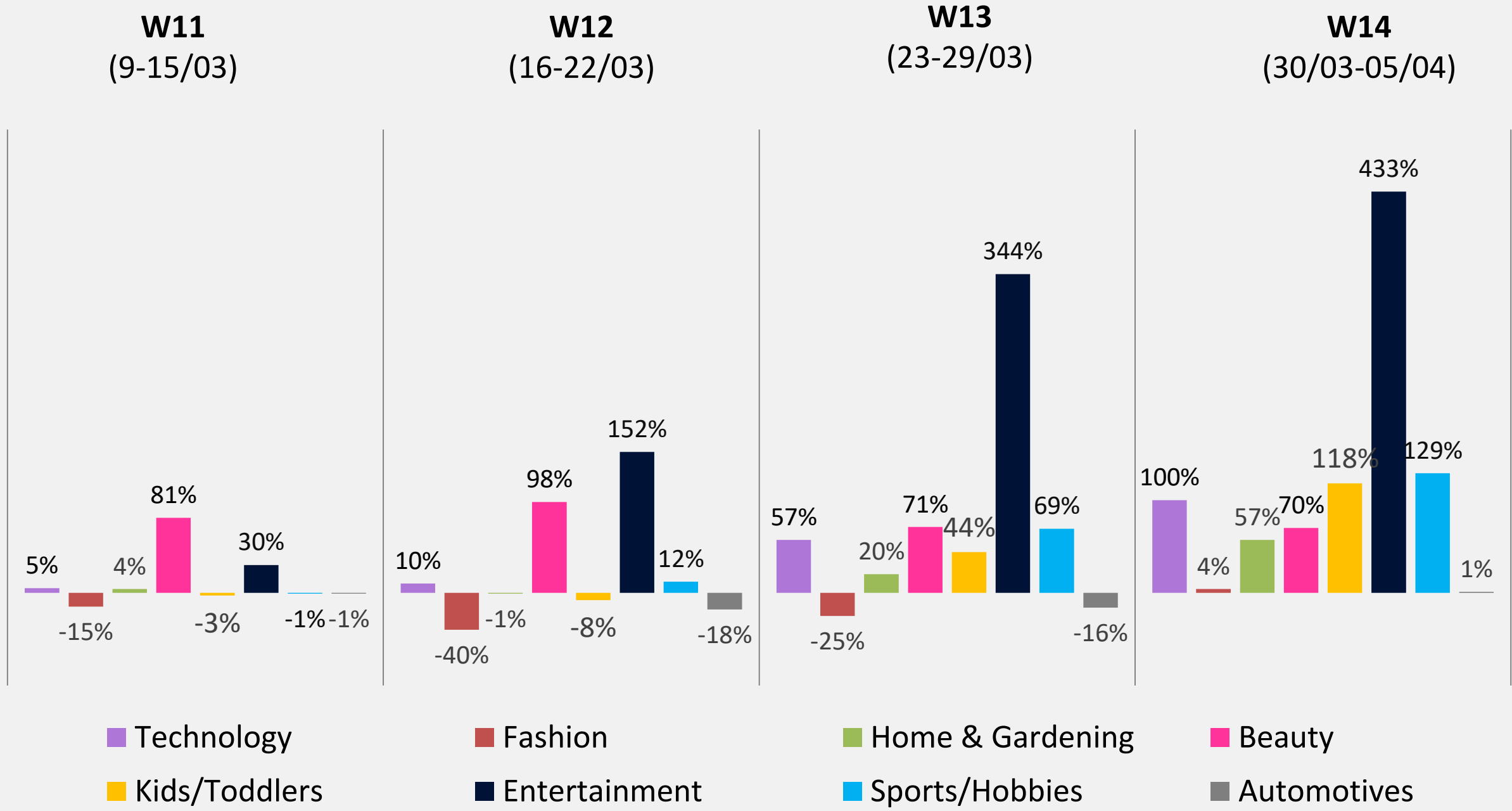
Weekly evolution of spending & sessions in Greek e-shops

First 14 weeks of 2019 vs same period 2020



Weekly evolution of sessions across e-commerce categories

Comparison week 2-8 March (pro quarantine)



Source: Greek e-Commerce Association (GRECA)



# dentsu

## *HOW CAN WE HELP*

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