



OPTIMISING MARKETING INVESTMENT IN THIS RECESSION

Practical advice for marketers to drive maximum value from their investments

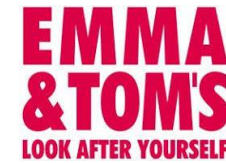
AANA Webinar

May 28, 2020

Karl Winther

Marketing Consultant

Introduction



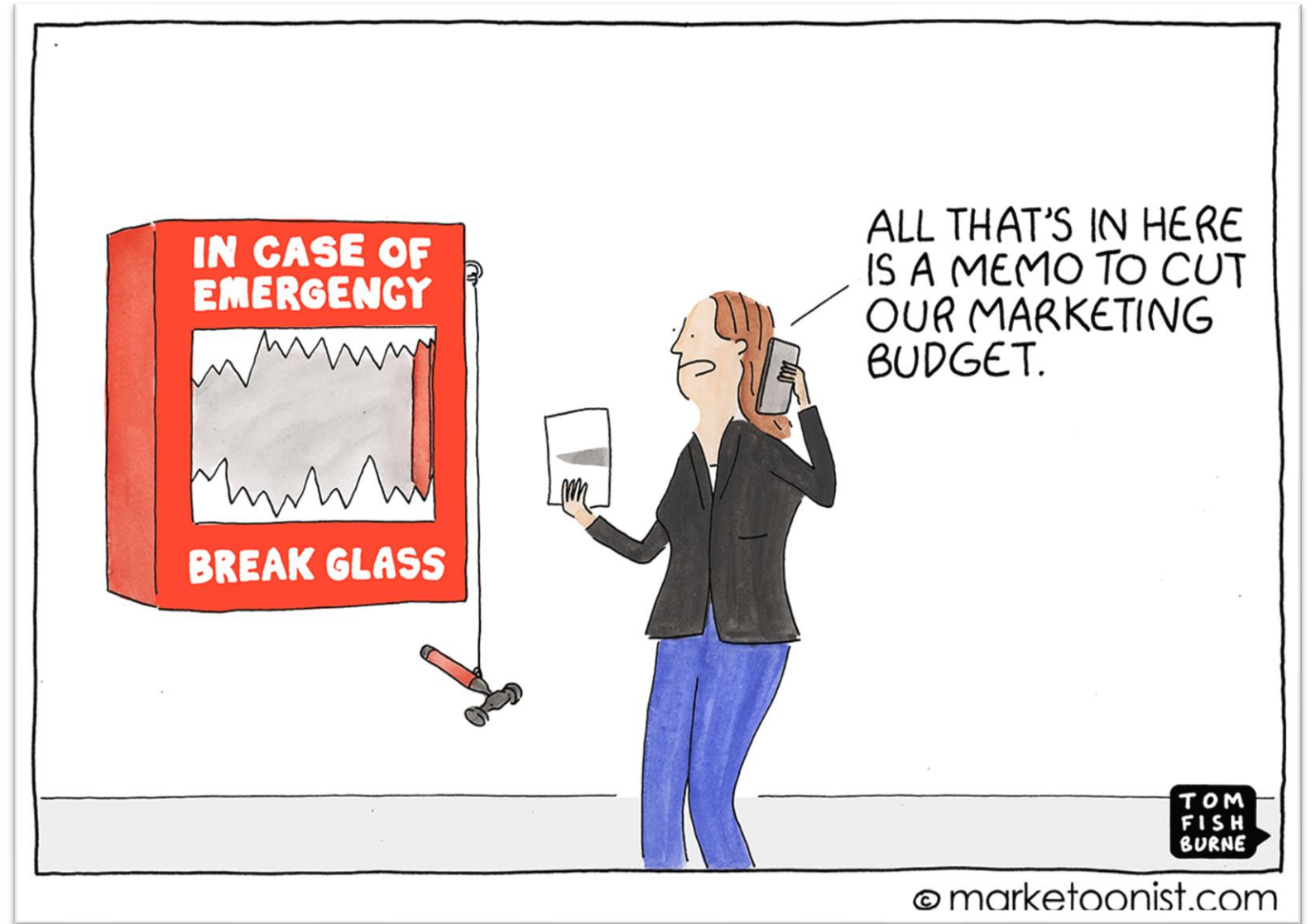
**We had
our plans**

**Everyone has a plan 'till they
get punched in the mouth**

Mike Tyson



How do Marketers respond?



A lot has been said...

What does the data tell marketers to do during the Coronavirus Crisis?

By Gareth Morgan



FRIDAY
58. Mark Ritson v Suncorp CMO Mim Haysom on marketers as "communications muppets"; Suncorp declares no COVID cuts to marketing spend

How Coronavirus Is Shifting Consumer Behavior (And How Marketers Should Respond)

How to measure and optimize tech brands' marketing efforts in the time of coronavirus

An Ipsos White Paper
Published: 26 March 2020

DO'S & DON'TS FOR MARKETING DURING THE CORONAVIRUS CRISIS



BRANDS & COVID

HOW TO PROTECT YOUR BRAND- A BRIEFING FOR MARKETING LEADERS FROM BBH

marketing in the time of coronavirus



Marketing in the COVID-19 crisis

A special series on responding to and rebounding from the COVID-19 crunch.

Marketing in the COVID-19 crisis

- ✓ The consumer and business impact
- ✓ Building a COVID-19 strategy
- ✓ Adapting the marketing function
- ✓ Changes to media plans and adspend
- ✓ Adapting creative communications
- ✓ Further reading

Advertising in Recession – Long, Short, or Dark?

A Guide to Advertising Best Practice in Recession

Peter Field April 6, 2020

Share Tweet Share

Advertising in Recession – Long, Short or Dark?

A guide to advertising best practice in recession

AUSTRALIA@HOME

Australia's only daily pulse check on how the coronavirus is impacting Australians and their lives.

3rd April 2020



Coronavirus Tracker

System1

Weekly Report 1st April

Advertising in a downturn

A report of key findings from an IPA seminar



Presenting the value of experience

WINTHER
consulting

**“Don’t
go
Dark”!**

**Don’t let your
marketing
flame go out!**



Invest for the Long-Term

“Substantial empirical evidence suggests that advertising during a recession leads to increases in market share and sales. Moreover, that effect seems to last beyond the recession”.

This is not
what is
happening

Just 7% of brands 'seize the opportunity' to invest more in marketing during Covid-19

The vast majority of marketers are cutting or maintaining their marketing budgets, saying that while finance teams understand the rationale behind investing in media during the coronavirus pandemic, they simply don't have the money to do so.



By Sarah Vizard | 28 Apr 2020

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Recession like no other

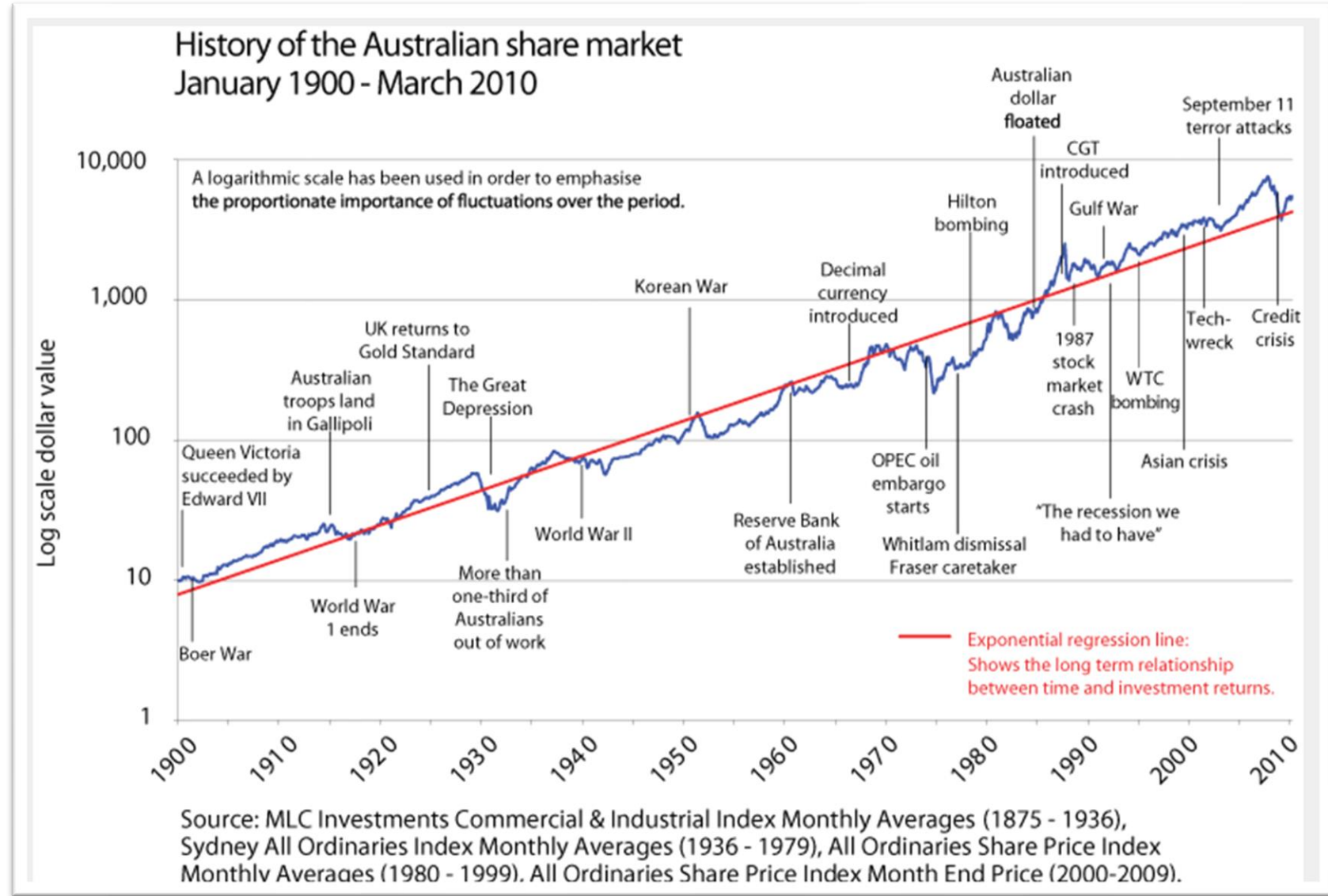
“This recession will probably be much sharper and deeper than most previous recessions and the shape of the recovery is unusually hard to predict. Telling advertisers to ‘invest for the recovery’ may grate if they are fighting for their very survival and there is no recovery in sight”.

What are Marketers to do?



Think
Long
&
Short

Need to believe
we will come
out of this



Think Long & Short

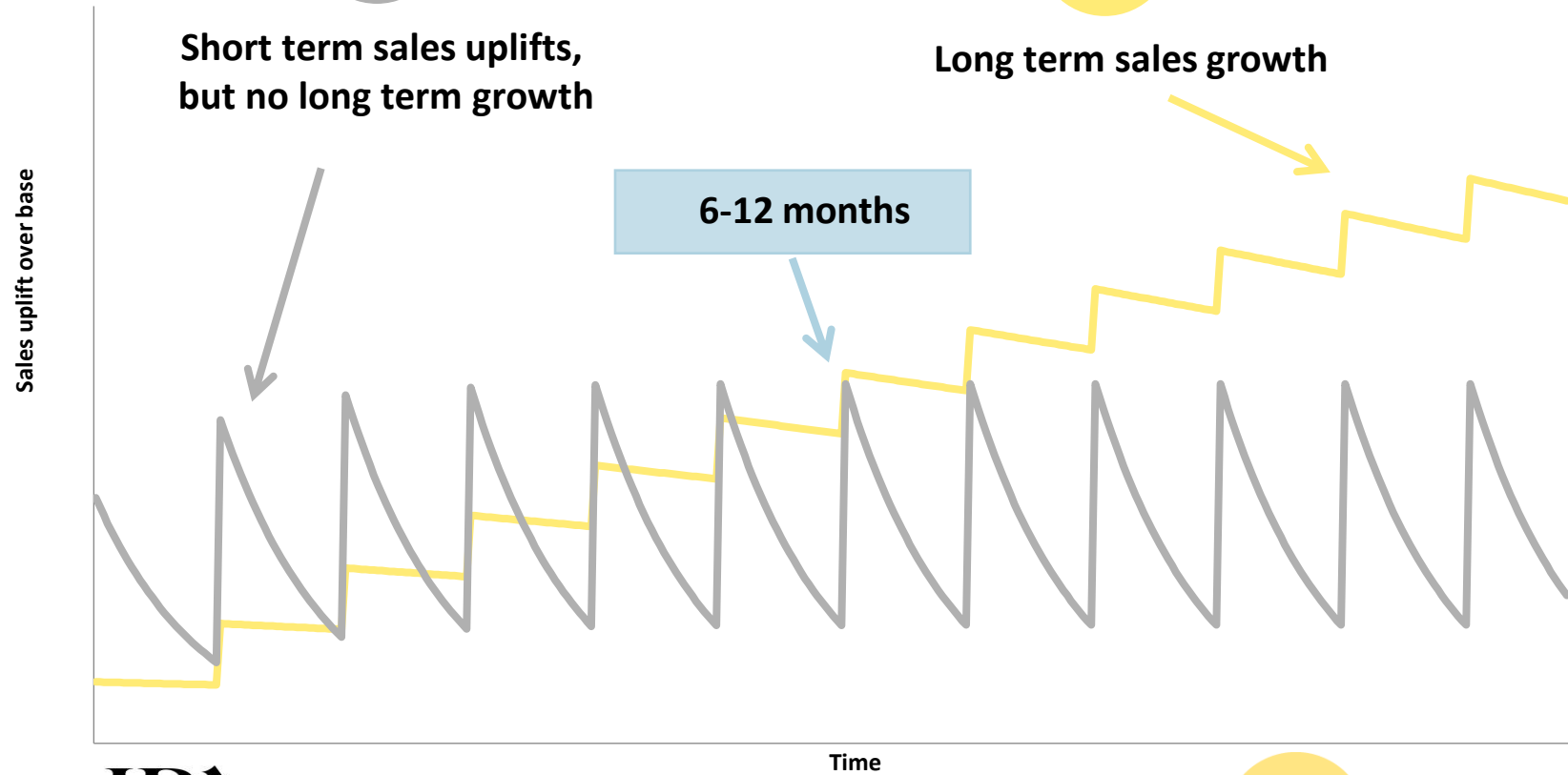
Right balance of
activation & brand
for your sector



Short term sales uplifts,
but no long term growth



Long term sales growth



IPA

Time

WINTHER
consulting

Framework to maximize investment NOW for the Long & Short

**Start with
the
Customer**

**Acts
&
Ads**

**Leverage
Paid,
Owned,
Earned**

Principles of Marketing are more important as when you have investment constraints

Framework to maximize investment NOW for the Long & Short

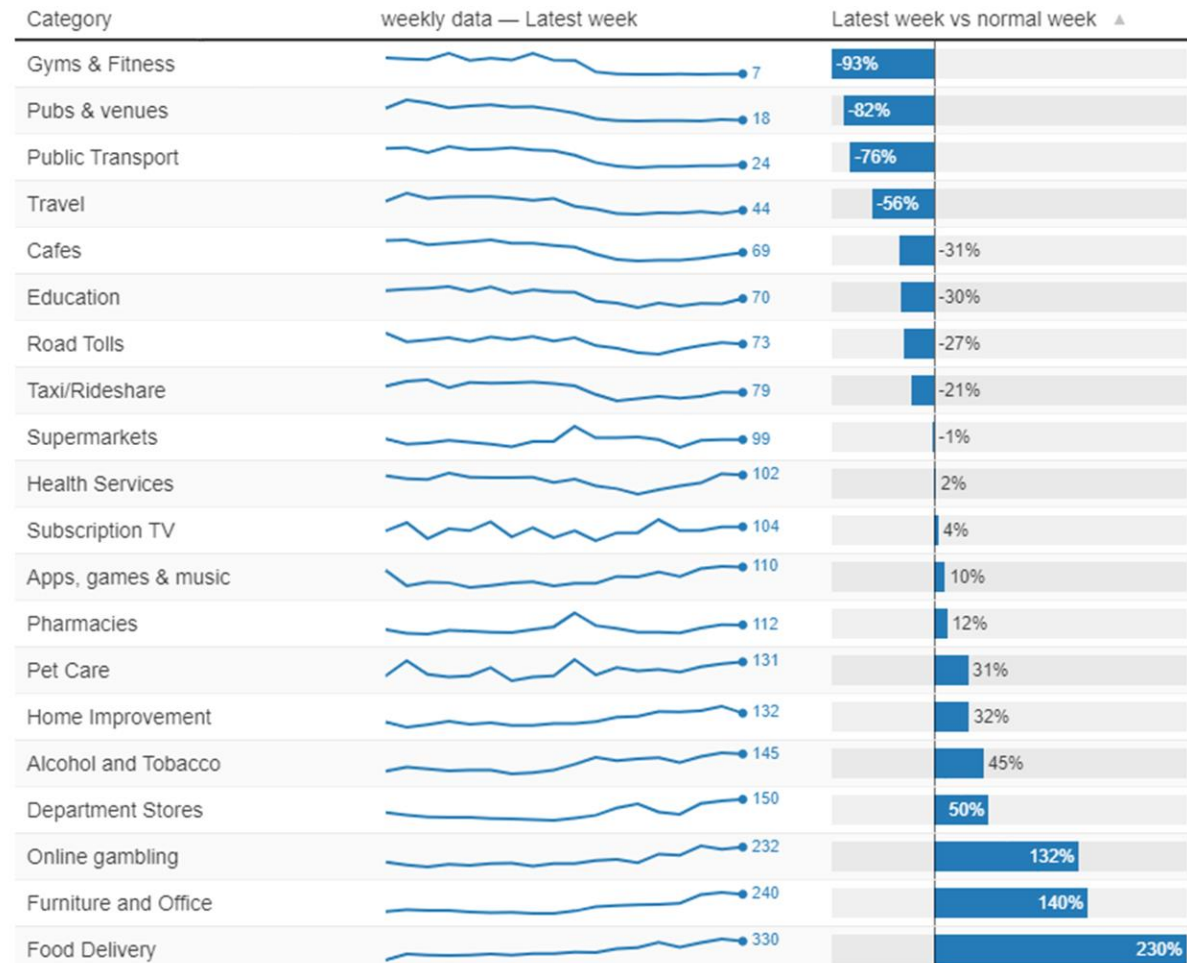
**Start with
the
Customer**

Start with the customer

People are still
spending
Winners / Losers

May 11-17th: Shutdown categories still very low; but easing of restrictions brings some recovery

Weekly index of consumption per person, Normal weekly average = 100



Based on a weekly sample of the transactions of c.250,000 Australian consumers

Table: Source to: illion & AlphaBeta (part of Accenture)

illion alphaBeta

WINTHER
consulting

Start with the customer

Media Consumption & Ad demand

Key highlights



↑ 25%

YouTube⁴
Video Searches
March YOY



↑ 12%

TV Live Streams²
Increase WOW
w/c 15th March



↑ 16%

Facebook⁶
Australians Browsing
more often during crisis



↑ 14%

Linear TV¹
Total projections,
WOW (Sun-Sat)
w/c 22nd March



↑ 23%

Twitter⁵
↑ 23% video views
Month on Month



↑ 25%

On Demand³
Increase WOW



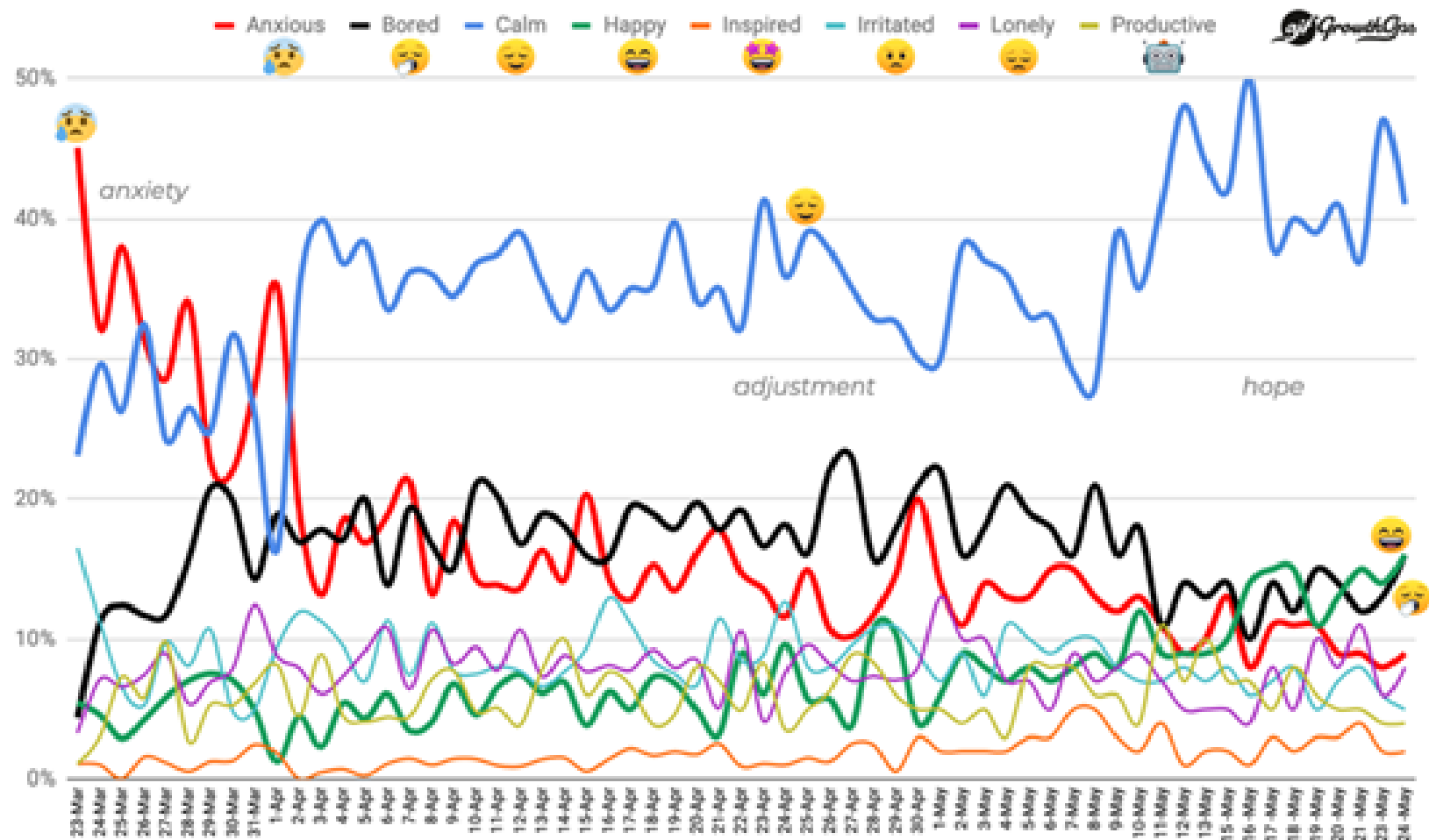
↑ 12%

Instagram⁷
Australians Browsing

Start with the customer

Sentiment

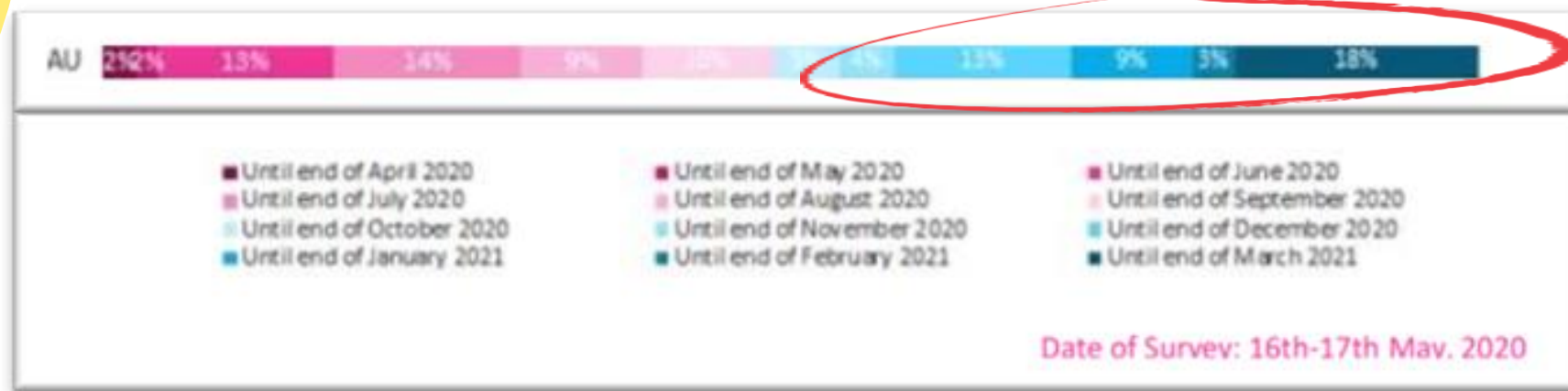
1. Unprecedented
2. New normal
3. Greenshoots



Start with the customer

Prediction | Longevity estimate of CV now increasing as far out as March 2021

Week 9- 16th-17th May, 2020



How long do you predict Coronavirus continue to seriously affect the country?

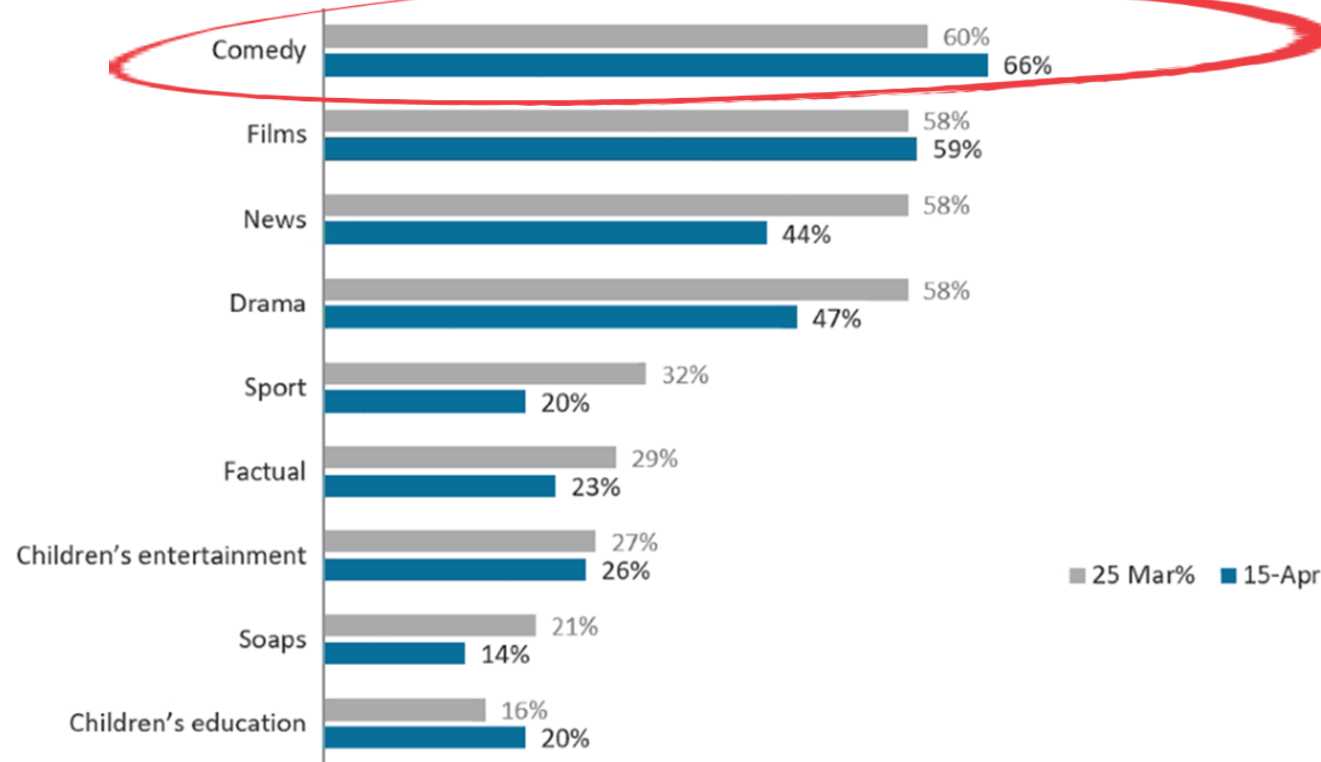
Sentiment
In for the long haul
-47% until 2021!

Start
with the
customer

Content
&
Context

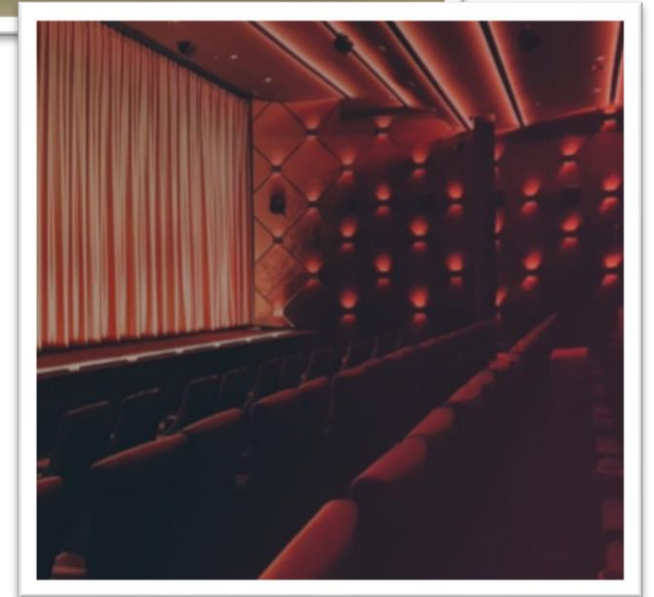
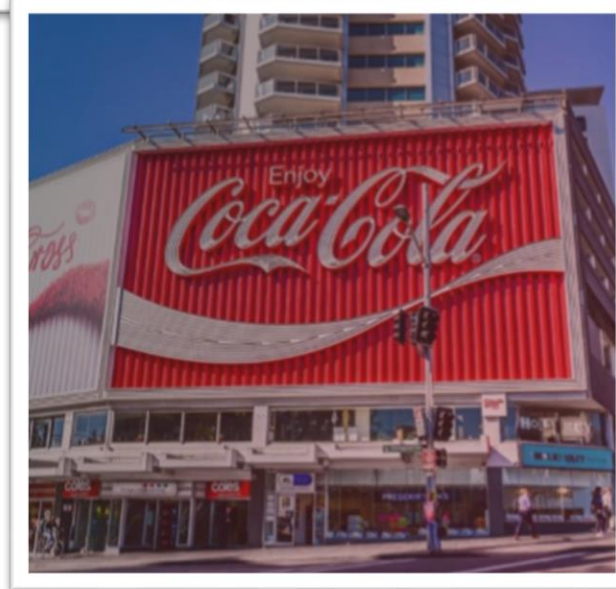
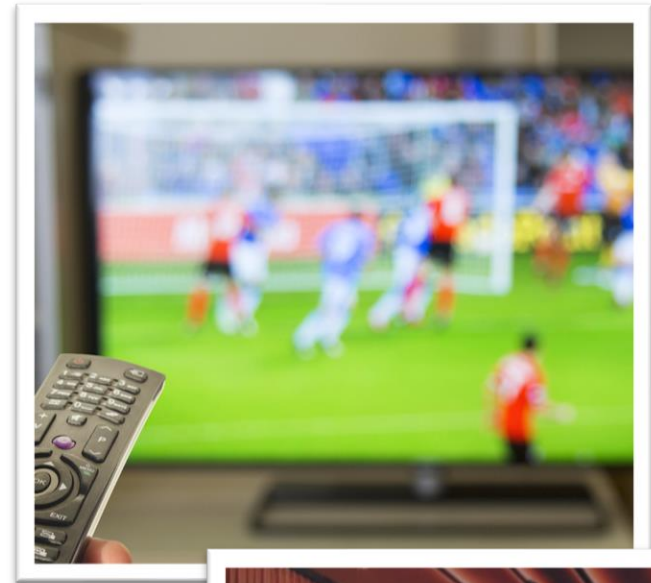
What would you and your household like to watch on TV in the next week?

Behaviours – last 7 days consumption

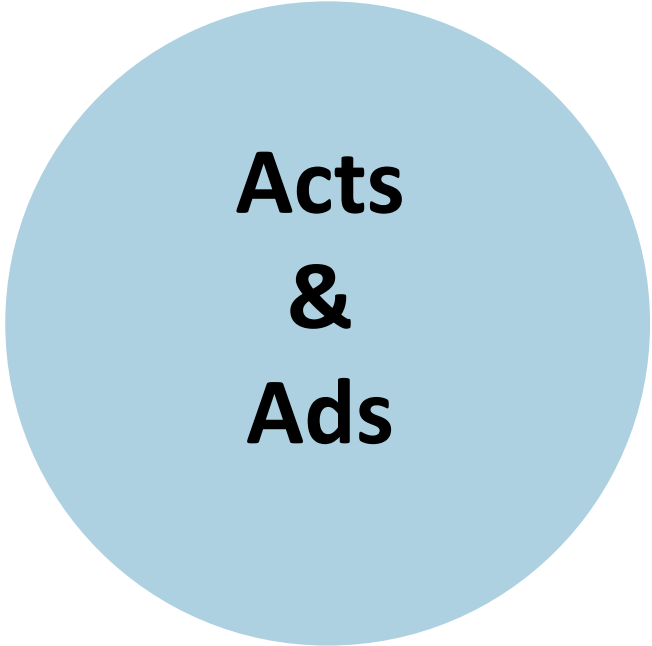


**Start
with the
customer**

**Planned
flexibility**



Framework to maximize investment NOW for the Long & Short



**Acts
&
Ads**

Acts & Ads?

“Now is a time to demonstrate ‘humanity and generosity’ – in your behavior, not just your advertising.”

Source: Peter Field, System 1 webinar, May 7 2020

Acts & Ads

How you behave
now may have a
bigger affect on
perceptions
than advertising

BRANDS' RESPONSE TO PANDEMIC WILL INFLUENCE FUTURE PURCHASE

Percent who agree

How well a brand responds to this crisis will have a **huge impact on my likelihood to buy that brand in the future**

⊥
65%

Woolworths, Coles receive most love during COVID

Natasha Gillezeau

A survey of 9517 Australians conducted by Growth Ops asked respondents what brand they think is doing a good job at dealing with the coronavirus.

Supermarket behemoths Woolworths and Coles topped the list, followed by the national broadcaster.

The Top Ten:

- 1 Woolworths
- 2 Coles
- 3 ABC
- 4 Telstra
- 5 Bunnings
- 6 AFL
- 7 Qantas
- 8 Westpac
- 9 Westfield
- 10 McDonald's

Acts & Ads

Brands helped
the 'war' effort



Acts & Ads

Build brand
saliency through
useful acts



Coronavirus: Iceland stores to open early for older shoppers

16 March 2020

Facebook, Twitter, Email, Share

Coronavirus pandemic



Some Iceland stores will open one hour early to allow older shoppers to buy food when it is quieter amid the coronavirus outbreak.

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13things
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Book now



DEFER PAYMENTS ON PRINCIPAL AND INTEREST FOR UP TO 6 MONTHS on a range of variable rate business loans

UP TO \$9 BILLION in additional limits for unsecured lending for existing customers via QuickBiz

BUSINESS CREDIT CARD DEFERRED REPAYMENTS

UNSECURED OVERDRAFT UP TO \$50,000 for 12 months depending on the business size and total business lending

Framework to maximize investment NOW for the Long & Short

**Leverage
Paid,
Owned,
Earned**

**Paid,
Owned,
Earned**

Paid
-TVC
-Digital display
-Print
-Radio
-Out of home
-Paid Search
-Paid social

Earned
-PR
-Reviews
-Shared Social

Owned
-Website
-Stores
-Email
-Content
-Social

Paid

Open
for 'safe'
business

from more than 60,000 patients for new intensive care beds.

In a teleconference to outline their findings, Professor McVernon and Professor McCaw said more work would be done over the next two weeks to calculate the impact of measures taken so far to keep infections down.

"We agree that given the control measures we have in place at the moment, we can see in the data that it looks like the curve is flattening and flattening strongly," said Professor McCaw, a professor of mathematical biology.

"There's fewer importations from returning travellers or returning

Australians and it looks like community transmission is continuing to be well suppressed.

"So in that sense you would think that it looks from a case infection point of view that a peak might have almost passed, or is passing, and then we will see a surge in hospitalisations in the coming week and then that would die away.

"But then of course we know that our population is still largely susceptible, so if we relaxed and went back to normal we would see a rapid explosive resurgence in epidemic activity."

The warning highlights the tension within and between govern-



ments decide whether further restrictions would be required.

Scott Morrison rightly argues theories about coronavirus are not facts.

Shop early for your Easter essentials

Don't leave it to the last minute to get what you need for the Easter long weekend.

Most stores are open 9am to 7pm weekdays (closed Good Friday) and trading hours may vary over the weekend.

Check your local store's trading hours at [bunnings.com.au](https://www.bunnings.com.au)



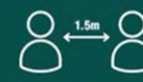
PLAN AHEAD

Research online, make a list and focus on getting your essentials.



SHOP SMART

Maintain 1.5m between yourself and others while queuing and in-store.



SOCIAL DISTANCING

To minimise risk, shop by yourself - avoid shopping in groups if possible.



CASHLESS PAYMENT

Use cashless payments where possible to minimise contact.

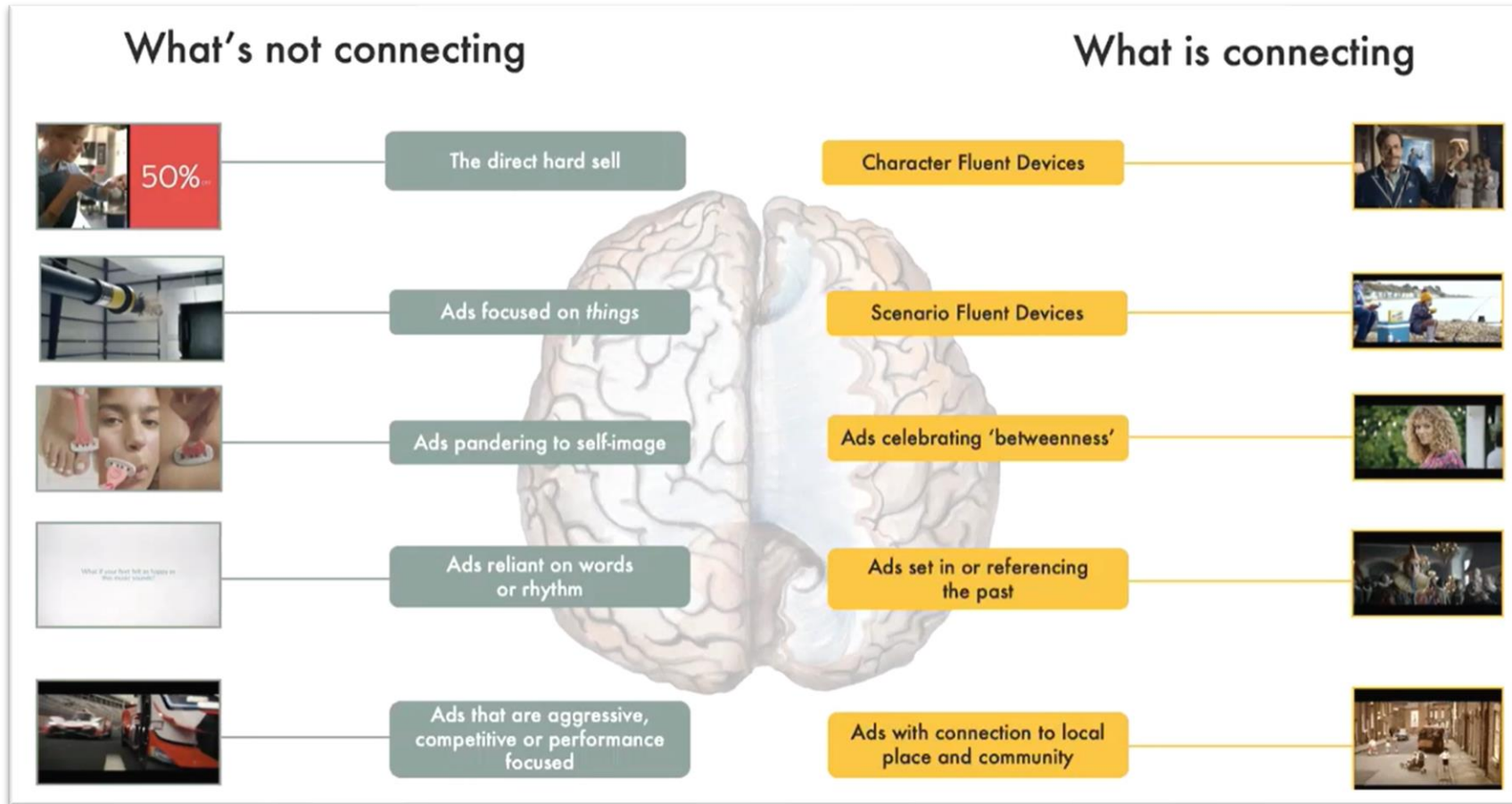
BUNNINGS
warehouse

NATAGE A011

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Paid

What creative is connecting?



True of NEW and OLD creative.

Paid

Distinctive
Assets



Paid

**They must
know it is you**



Paid

- Celebrates Connectedness
- Sense of Nostalgia



Qantas revives 'I still call Australia home' campaign as international travel remains a distant dream

May 13, 2020 9:33
by ZOE WILKINSON



Qantas has again revived Peter Allen's 1980 song 'I still call Australia home' in a social media video that features children from The Australian Girls Choir and The Gondwana National Choir performing the song through individual recordings.

'I still call Australia home' has been used in Qantas' marketing since the 1990s. It is still regarded as one of the airline's most successful campaigns. Most recently it was used in the [2018 in-flight safety video](#).

This iteration, however, comes at a time when international travel and the airline industry have ground to a halt.

Elliott Wheeler, of Turning Studios, is the composer and musical director of the latest rendition of the song. Wheeler has also been working with Qantas on the launch of its centenary campaign.



Budweiser brings back 'Wassup' ad with a quarantine-themed remake

Budweiser has re-recorded the audio for its iconic 1999 advert to make it more relevant to people in lockdown and encourage them to connect with friends and family.



By Sarah Vizard | 24 Apr 2020

Share this article



Paid

**Optimism
&
Positivity**

Nike's Latest Anthem, Narrated by LeBron James, Is Filled With Hope for a Broken World

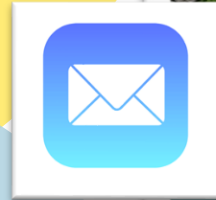
A comeback story for humanity from W+K Portland

By Doug Zanger | 12 hours ago



Owned

- Website
- Stores
- Email
- Content
- Social



BUNNINGS warehouse

SHOP ONLINE NOW

SHOP ONLINE WE WILL DELIVER DRIVE & COLLECT

Trending D.I.Y. projects

- How to hang a mirror
- How to top up your roof insulation
- Best indoor plants for health
- 3D wall art using cushions

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bunnings

Watch IGTV video

16,245 views · 24 comments



HOW TO GROW VEGGIES AT HOME - WATCH NOW!

bunnings

23 April

16,245 views · 24 comments

Browse IGTV >

Life at Home: Essential Listening

Staying Grounded

Bunnings
Subscribed

5.0 ★★★★★

52 Ratings

2020

Home & Garden

There's never been a better time to get into plants and gardening. This show will appeal to newbie gardeners and seasoned green thumbs. [more](#)

Preview

23 APRIL

Stavina Grounded Trailer

There's never been a better time to get into gardening. This show will appeal to newbie gardeners and seasoned green thumbs. [more](#)



Owned

- Website
- Stores
- Email
- Content
- Social

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WITH SATV

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57 · 5 Comments

Like Comment Share



Earned



Positive stories

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lifestyle food > eat

Life in lockdown: Arnott's shares 'secret' Scotch Finger recipe

The biscuit company has adapted a recipe for an iconic bestseller so you can make it at home - and you'll only need a few pantry items.

Hannah Paine @hannahpaine 3 comments

news.com.au MAY 1, 2020 10:09AM

Introducing one mobile plan for your family

7NEWS | SUNRISE | THE MORNING SHOW | THE DAILY EDITION | SPOTLIGHT | 7PLUS

Your location: MELBOURNE, VIC

Monday, 25 May 2020

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LIFESTYLE > FOOD

Arnott's has revealed its recipe for Iced Vo Vo biscuits

SQUARESPACE
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LATEST IN LIFESTYLE

6:19 PM
We've been roasting chicken the wrong way all this time

6:09 PM
Learner driver cops follow-up fine over COVID restriction breach

6:00 PM
Stage two of coronavirus restrictions has been brought forward - here's what it means

5:21 PM
WINTER WARNING: Five-year-old girl hospitalised after falling into fire pit while roasting marshmallows

5:15 PM

The secret's out! Arnott's has just released the recipe for its iconic Iced

Earned



CULTURE, LIFESTYLE, NEWS

LVMH FRENCH PERFUME HOUSES MANUFACTURE FREE HYDROALCOHOLIC GEL

MARCH 21, 2020 GUYLAINE S GAMBLE LEAVE A COMMENT

☆☆☆☆☆ RATE THIS

Daily Mail

AUSTRALIA

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Deliver care packages to loved ones fast! Taxis launch 24/7 parcel delivery services to help with 'no-touch' jobs during the coronavirus crisis

- A taxi business has launched a new no-touch parcel delivery service online
- Australia's 13cabs is now picking up and delivering parcels to people's doors
- The new 'no-touch' policy aims to limit the spread of the contagious COVID-19
- Food delivery system Uber Eats has also recently announced a similar policy
- Coronavirus symptoms: what are they and should you see a doctor?

GoDaddy



Leverage your acts

Optus waives mobile fees for healthcare workers fighting COVID-19

April 3, 2020 9:53



Optus is waiving the postpaid mobile access charges for healthcare workers for the next three months, to say thank you for their work fighting COVID-19.

WINTHER consulting

Framework to maximize investment NOW for the Long & Short

Start with the Customer

- Media consumption changes
- Monitor consumer sentiment
 - Content
 - Context
- Planned flexibility

Acts & Ads

- Double down on your positioning/purpose.
- Build saliency through acts.

Leverage Paid Owned & Earned

- Paid
 - Open for business
 - Distinctive assets
 - Connectedness & Nostalgia
 - Positivity
- Owned - Content
- Earned:
 - Positivity
 - Leverage acts



THANK YOU

Karl Winther
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Strategic Marketing Services