

HELLO

FLORIDA ISRAEL BUSINESS ACCELERATOR



MESSAGING & COVID-19

As marketers, this is the most challenging period to navigate. It's turned our lives upside down, but it's also underlined the importance of flexibility, contingency planning and reliance on data to inform our decisions as marketers.

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Key Themes

- **Onsumer Insights**
- **12** Planning Considerations
- **13** Innovative Examples
- **14** Adapting to the New Normal

CONSUMER INSIGHTS



Changing
Habits: More
connections
with loved ones.

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
Reading more online news	38%	39%	31%	39%	47%	37%	16%
Watching more TV	36%	39%	25%	32%	42%	39%	23%
Cleaning my home more often	34%	36%	25%	35%	39%	35%	18%
Spending more quality time with my family	30%	33%	17%	26%	40%	29%	12%
Communicating with my friends / family more often	29%	32%	15%	27%	35%	30%	15%
Using social media more often	27%	29%	16%	32%	37%	23%	6%
Listening to more music	26%	28%	15%	35%	30%	23%	12%
Watching more online TV	24%	26%	14%	21%	34%	22%	10%
Buying more items online	20%	22%	13%	12%	26%	24%	3%
Cooking more	20%	22%	11%	18%	29%	16%	14%
Exercising more	17%	19%	7%	20%	22%	16%	5%
Reading more books	16%	17%	12%	20%	19%	14%	11%
Gaming more often	14%	15%	11%	21%	21%	8%	8%
Reading more print news	12%	13%	9%	8%	20%	11%	4%
Dedicating more time to learning	12%	13%	8%	20%	15%	9%	5%
Ordering more takeaways	11%	12%	5%	7%	20%	8%	1%
Working more often (longer than my expected hours)	8%	9%	5%	7%	12%	6%	4%
Other	6%	7%	3%	5%	6%	10%	3%
My behavior at home hasn't changed significantly	33%	30%	48%	28%	21%	36%	63%

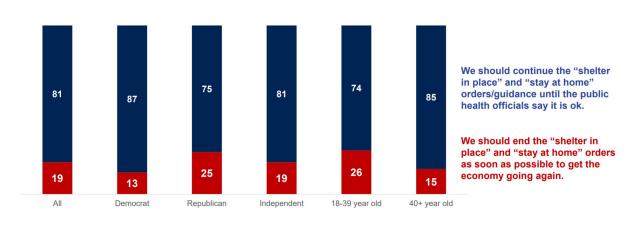
At the beginning of the outbreak in the U.S., Americans were feeling concerned about the health and safety of their families and either spent more time with them or reached out to them more often.



Health continues to be the immediate concern, for now.

Americans are prioritizing health over the economy, for now





Reuters/Ipsos Data

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Across demographics and political groups, health is the biggest concern for audiences.



Personal economic concerns are growing among the general public.

Personal
economic
concerns are
growing
among the
general public

- 46% of U.S. consumers report that the crisis has had an effect on their households' earning ability.
- More than half of Americans (55%) are concerned that they may lose their job due to the coronavirus outbreak. Nearly 2 in 5 (41%) think their income will be lower in 2020.
- Americans are struggling to pay bills: Over a quarter (27%) have missed (or will soon miss) a bill payment and ages 18-49 are more likely than those 50+ (37% vs. 16%).



While we are a ways off from fully having a handle on Covid-19, the personal economic fallout is becoming a larger concern for consumers than the global or national economy.



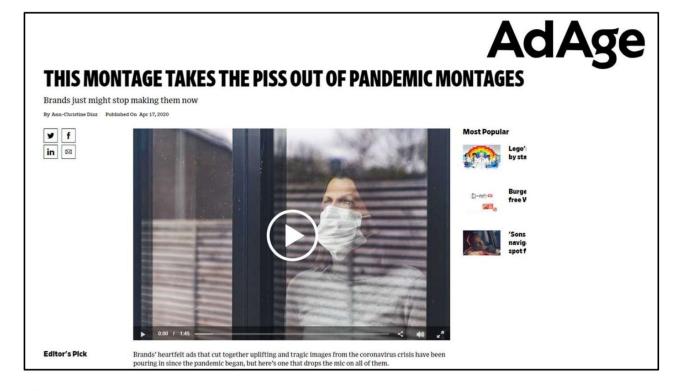
Consumers approve of brands who are communicating relevant messages about response to Covid-19.

	All	AU	BR	CA	CN	FR	DE	IN	IR	IT	JP	NZ	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Strongly approve	40	30	56	34	39	25	22	54	34	45	15	26	47	24	47	31	30	30
Somewhat approve	42	46	31	44	48	41	42	32	45	37	36	44	40	52	36	44	44	42
Neither approve nor disapprove	13	19	8	17	10	22	17	6	16	13	37	25	9	20	12	19	20	22
Somewhat disapprove	3	3	2	3	2	7	10	5	4	3	7	4	3	3	2	2	4	5
Strongly disapprove	2	2	3	2		6	10	4	2	3	6			2	3	4		- 0
evels of Appr	oval fo	or Br			vitie		rovi				-	o/T	ips	2	3	4	2	2
			and	Acti		s: P	rovi	ding	g Pra	ctica	al Inf		ips	SG	ZA	SP	UK	
	e of brands	providin	rand g practic	Acti	nation /	S: P	rovi	ding	Pra	Ctica	alInf	n			4127			USA %
6 who approve / disapprov	e of brands	providin AU	rand g practic	Acti	cN	s: P	rovi	ding	Pra to deal	ctica with the	al Inf	n NZ	PH	SG	ZA	SP	UK	USA
6 who approve / disapprove	All	AU %	rand g practic BR	Acti	CN %	FR %	rovi	ding	Pra to deal	with the	al Inf	NZ %	PH %	SG %	ZA %	SP	UK %	USA %
% who approve / disapprove Strongly approve Somewhat approve Neither approve nor	All %	AU % 45	g practice BR %	Acti	CN %	FR %	rovi	ding	Pra	ctical with the	al Inf	NZ % 47	PH % 69	SG % 39	ZA % 63	SP % 55	UK % 46	USA % 48
Levels of Approve Strongly approve Somewhat approve Neither approve nor disapprove Somewhat disapprove	All % 57 32	AU % 45 38	g practice BR % 74	Acti	CN % 58 35	FR % 44 35	rovi	people IN % 66	Pra	with the	situation JP % 28 38	NZ % 47 37	PH % 69 26	SG % 39 49	ZA % 63 26	SP % 55 33	UK % 46 35	USA % 48 34

The majority of US consumers approve of brands showcasing how they are responding to Covid-19 in advertising, and an even greater proportion approve of brands that provide practical tips & info. Advertising as usual received approval ratings of about 48%.



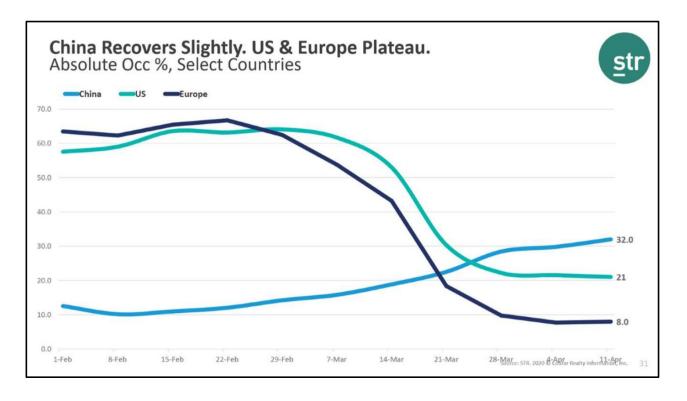
However, consumers are also feeling inundated with overly sentimental/sea of sameness around Covid-19.



https://youtu.be/vM3J9jDoaTA



Staggered market opening and recovery pose tremendous challenges for global brands.



While markets like China are starting to see an uptick in economic activity, increased travel and lifting occupancy rates, other markets lag behind with no clarity on when their recovery can begin.



People are more optimistic about their country's ability to overcome, but less confident about the global recovery.

% who say they feel optimistic / not optimistic that their country will overcome the coronavirus / COVID-19 outbreak

	All	AU	BR	CN	FR	DE	IT	JP	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1 - Not optimistic at all	4	6	12	1	5	6	3	19	2	5	8	5	7	5
2	7	9	21	1	10	13	7	29	5	5	12	12	10	7
3	19	30	30	5	42	43	36	35	18	26	31	34	33	32
4	25	33	24	22	32	30	35	14	26	42	24	31	28	29
5 - Very optimistic	46	22	13	70	12	9	19	3	49	24	25	18	21	27

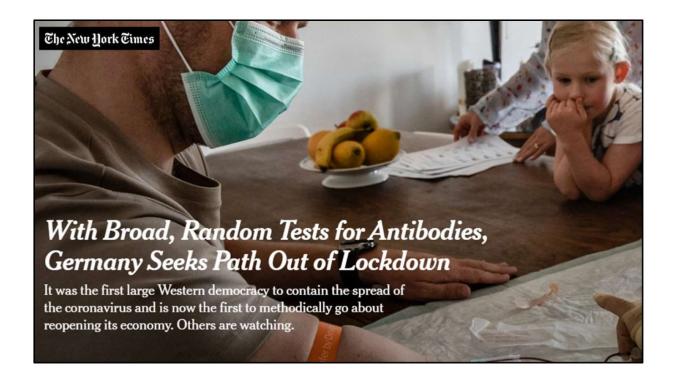
% who say they feel optimistic / not optimistic that the world will overcome the coronavirus / COVID-19 outbreak

	All	AU	BR	CN	FR	DE	IT	JP	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
1 - Not optimistic at all	6	6	5	6	6	9	4	27	1	7	2	6	7	4
2	15	12	14	17	14	20	10	31	1	16	7	17	11	10
3	38	35	36	40	48	49	39	31	14	44	27	37	37	35
4	26	29	31	26	23	18	31	8	27	24	27	27	28	30
5 - Very optimistic	15	18	15	11	9	5	15	3	57	9	37	14	17	21

Knowing that consumers are more likely to want to stay closer to home immediately following containment of Covid-19, how does that impact your international marketing efforts?



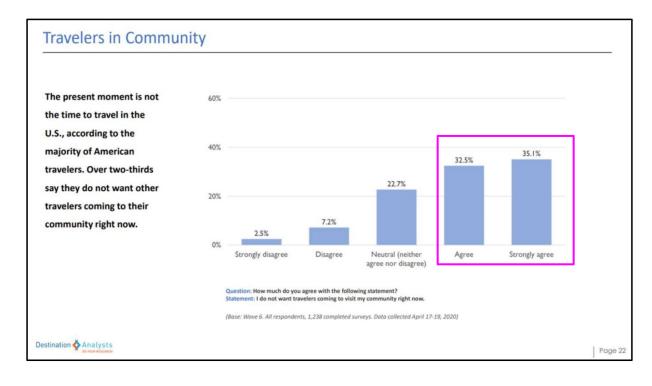
Private and public sectors are looking to innovation to help speed the rebound process.



Many countries and companies are working on innovations and technology that will help fast-track the ability for countries to open up economic activity safely to increase consumer confidence.



Be mindful of how ready your consumers and communities are as things open.

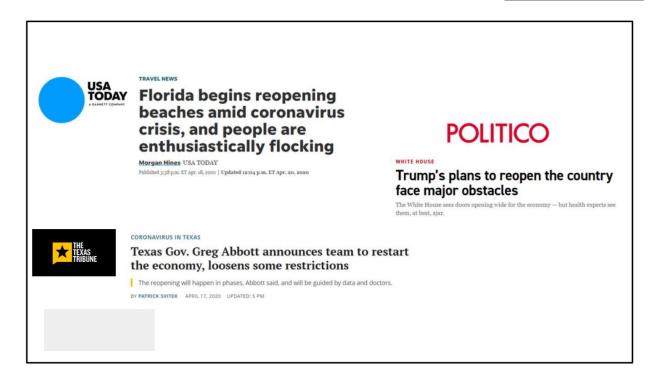


As markets open up, we have to be mindful of the fact that residents may not be ready to receive visitors into their community. This will require a unique balancing act for businesses that rely on visitors as well as residents to sustain their success.

Source: Destination Analysis



Be prepared to navigate the clutter of the 24-hour news cycle.



Because of the 24-hour news cycle, anything can and will be politicized. Political fallout from government action/inaction will dominate the news cycles. Navigating the clutter will be a challenge, but the pulse of your audience is what should be prioritized.

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PLANNING CONSIDERATIONS



Digital and social consumption is way up.

% who say they're doing the following on the internet today

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomer
	%	%	%	%	%	%	%
Searching for coronavirus / COVID-19 updates	68	68	63	67	71	69	54
Listening to music	58	59	51	71	62	54	38
Watching movies / shows	49	50	43	51	52	51	34
Watching funny videos	42	42	40	52	44	39	27
Playing games on mobile	40	41	36	47	45	36	34
Looking at memes	32	33	26	54	41	21	9
Playing games on PC / laptop	29	30	26	29	36	25	25
Searching for cooking recipes	28	29	24	21	35	29	21
Reading business & finance articles / news	27	28	21	14	35	28	21
Searching for discounts from brands	24	25	22	22	28	23	23
Reading healthy eating articles	24	26	14	19	31	22	16
Reading sports news	23	24	19	16	32	19	24
Reading celebrity news	22	22	19	25	25	19	15
Listening to podcasts	18	19	14	16	26	16	7
Watching fitness videos	18	18	14	18	24	17	3
Searching for fashion trends / discounts	16	17	13	14	23	13	7
Reading live blogs	15	16	12	12	22	13	9
Watching esports videos / livestreams	12	13	7	14	20	9	2
Searching for vacations	12	12	9	11	18	9	3
Watching webinars	11	11	7	9	16	9	6
I'm trying to stay off the internet	5	5	8	5	4	6	8

Question: Which of the following, if any, are you doing while on the internet today? Please select all that apply.

Aside from immediate Covid-19 activities, consumers are looking for distractions and help, and they're going online as their main resource.



Broadcast is also seeing an increase during this time period. % who say they've started consuming or are consuming more of the following since the outbreak

	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
	%	%	%	%	%	%	%
Broadcast TV	38	39	34	24	35	45	42
Online videos (e.g. YouTube / TikTok)	38	39	30	51	44	35	11
Online TV / streaming films	37	38	30	38	41	38	21
Online press	29	30	23	21	36	31	15
Music-streaming	28	30	18	28	35	27	12
Video games	24	25	21	31	31	19	10
Radio	22	23	18	17	26	23	15
Livestreams	22	24	12	17	30	21	9
Books / literature	19	20	17	18	20	21	13
Podcasts	13	13	8	11	20	10	4
Physical press	11	12	7	9	19	7	7
None of these	15	13	20	10	10	17	24

	Male	Female	Higher Income	Lower Income
	%	%	%	%
Broadcast TV	43	33	43	39
Online TV / streaming films	42	32	46	35
Online videos (e.g. YouTube / TikTok)	41	34	42	39
Online press	34	24	28	26
Music-streaming	32	24	38	22
Video games	28	20	26	23
Livestreams	27	16	23	21
Radio	26	18	28	20
Books / literature	20	19	30	15
Podcasts	16	9	15	10
Physical press	13	9	10	8
None of these	9	20	10	15

Question: Which of the following media have you started consuming, or are consuming more of, since the beginning of the outbreak?

Broadcast TV has seen its first increase in consumption in many years due to lockdown and consumers spending more time at home. How can your brand be a solution to the need for information or to serve as a valuable distraction?



Americans are open to live-streaming, particularly younger ones.

% who say they would live-stream the following if live events can't go ahead due to the coronavirus

	All	AU	BR	CN	FR	DE	IT	JP	PH	SG	ZA	SP	UK	USA
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Live streams of conferences / talks	22	20	27	22	16	22	24	11	41	25	26	25	17	21
Live streams of music concerts	42	32	33	50	32	32	34	31	41	29	39	43	35	34
Live streams of sports events	42	43	30	52	24	32	28	20	33	33	36	33	38	34
Live streams of theater shows	21	25	20	16	27	15	25	24	25	24	25	34	32	28
None of these	28	33	35	19	41	42	33	50	21	35	28	28	34	37

% who say they would live-stream the following if live events can't go ahead due to the coronavirus*

*Using all country data

	Gen Z	Millennials	Gen X	Baby Boomers	Female	Male	Higher Income	Lower Income
	%	%	%	%	%	%	%	%
Live streams of conferences / talks	30	24	18	12	22	22	26	19
Live streams of music concerts	49	44	38	30	45	39	47	38
Live streams of sports events	39	47	39	26	33	50	49	34
Live streams of theater shows	21	24	17	20	24	18	23	17
None of these	21	23	34	47	30	26	23	31

Does the opportunity for live-streaming fundamentally change the way that brands can engage with consumers outside of store or in-person experiences?



Attitudes towards advertising

- 7 in 10 approve of coronavirus-focused advertising, but 50% still approve of "normal" advertising
- Globally, about 50% say they approve of brands running "normal" advertising campaigns which aren't linked to coronavirus;
 - only around 20% express disapproval, with the rest being neutral.
 - "normal" advertising is the only one to see disapproval ratings climb toward 20%.
 - we see higher approval scores for brands running campaigns which show how they are responding to coronavirus / helping customers, as well as for contacting customers to let them know how they are responding (both at around 80%)



Attitudes towards advertising

- The highest approval ratings of all come for brands providing practical information / tips which help people to deal with the situation
 - close to 90% support this
 - the lowest scores are seen for "normal" advertising (52%) and brands continuing to sell non-essential products online (60%).
 - It's still majorities who support these two activities, but it's an indicator that any "business as normal" activities need to be managed very carefully.
- At least 20% say they plan to watch more news coverage, watch more streaming services, watch more videos, or spend more time socializing together as a family.



Increased demand for long-form and video content

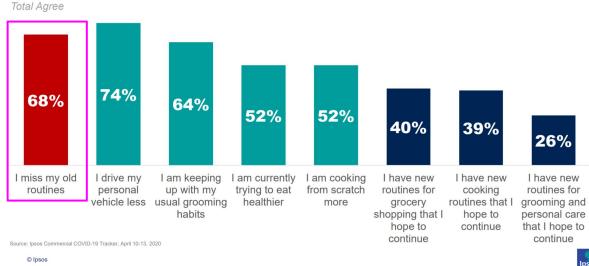
- Video platforms have a strong opportunity
 - □ 1/3 want more funny videos / memes
 - a similar proportion want how-to or tutorial videos which teach them how to do new things
- In some cases, age is a huge determining factor
 - Films and TV repeats have relative cross-age appeal
 - Gen Z and then Millennials are the keenest for most other types of content – with the generational splits most pronounced for updates from vloggers / bloggers, live esports streams and funny videos.



People miss their old routines, but expect many of the changes to be around for the long haul.

Routine changes are widespread, but old patterns are missed

Thinking about your habits and routines now, to what extent do you agree or disagree with the following?





Many Americans are adapting to the "new normal" but do miss their old routines. Time will tell if many of the new routines stay around long after Covid-19 is contained.

Source: Ipsos Commercial Covid-19 Tracker

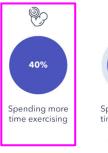


Increased focus on health and well-being.

CORONAVIRUS: THE IMPACT ON CONSUMERS | WAVE 2

Exercise spike predicted to outlast the pandemic

% who say they'll carry on doing the following when the outbreak is over









Watching more news coverage



Watching more

shows/films on

streaming services

(e. q. Netflix)

Watching more videos (e.g. on YouTube)



of those who said they never exercised before the crisis say they intend to continue exercising after it

That means the rate of those engaging in exercise in these countries could theoretically grow by 15% overall.

2020 GlobalWebIndex | Source: GlobalWebIndex Coronavirus Study, March 31-April 2 Base: 15.079 internet users aged 16-64 in 17 global markets

What opportunities are there to support consumers in their new focus on health and well-being?

INNOVATIVE EXAMPLES



Social responsibility matters, especially when seeking younger audiences.

https://adage.com/article/cmo -strategy/coke-puts-social-di stancing-message-times-squa re/2245631



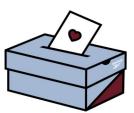


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Social responsibility matters, especially when seeking younger audiences.

#REEBOKLOVE. TOGETHER, WE GOT THIS

These days, many are feeling helpless and wondering, "what can I do to help?" With ReebokLove, now you can do everything from nominate someone for free shoes to getting free workouts for yourself.



NOMINATE A HERO FOR FREE REEBOKS

Whether it's a healthcare worker, grocery store clerk, police officer, postal worker, delivery person or another essential worker, we want to thank them with a pair of Reeboks - on us. Just nominate someone and tell us how they're helping.

*Donation of shoes subject to availability. Not all nominations are guaranteed a free pair of Reebok shoes. Style of shoes provided is at Reebok's discretion. *

NOMINATE A HERO

https://www.reebok.com/us/giveback



Social responsibility matters, especially when seeking younger audiences.

SHOW SUPPORT WITH EVERY

Donations support WHO's work to track and understand the spread of the virus, to ensure patients get the care they need, frontline workers get essential supplies and information, and to accelerate efforts to develop vaccines, tests, and treatments.

If you would prefer to donate directly to the Fund, HERE.



Get free at-home fitness and access to our trainers. Enjoy daily live BOKS classes, games and activities for both adults and kids.



We've created a dedicated team focused on creating face covers to help protect those on the front lines.

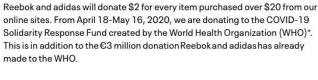
Showing Appreciation For Our Heroes

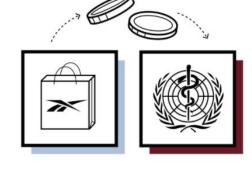
We've increased our company discount to 50% off for all first responders, front line workers, military members, educators and more.

THANK

LEARN MORE











WORK OUT NOW

https://www.reebok.com/us/gi veback

Lead with empathy and human-centric messages.

https://www.caranddriver.com/news/a31560228/hyundai-genesis-customer-assurance-co

ronavirus/

CAR™DRIVER

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Hyundai, Genesis Offering Payment Aid during Coronavirus Pandemic

Hyundai and Genesis turn to their 2009 Great Recession playbook with a Customer Assurance program for the Genesis G70, Hyundai Santa Fe, and other vehicles.



BY SEBASTIAN BLANCO MAR 14, 2020

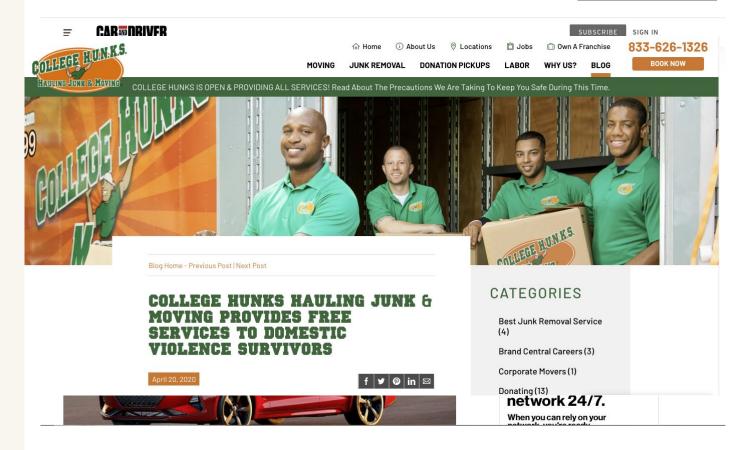




First responders get priority access to our network 24/7.

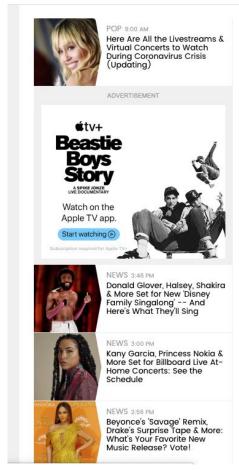
When you can rely on your

Lead with empathy and human-centric messages.



https://www.collegehunkshaul ingjunk.com/blog/2020/april/c ollege-hunks-hauling-junkmoving-provides-free-/

Embracing virtual connections



Here Are All the Livestreams & Virtual Concerts to Watch **During Coronavirus Crisis** (Updating)

5/1/2020 by Billboard Staff







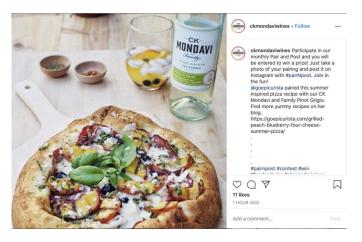


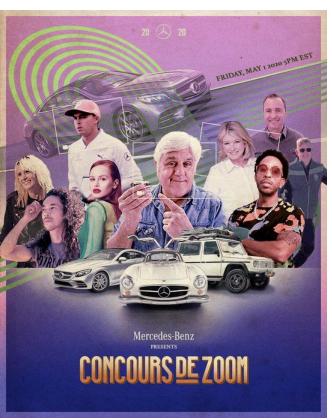
https://www.boredpanda.com/ national-cowboy-museum-he ad-of-security-twitter/?utm source=google&utm medium =organic&utm campaign=org anic





Demonstrating relevance to the "stay at home" lifestyle







Demonstrate support for fellow businesses, and even competitors.





https://www.instagram.com/st ories/highlights/17917386964 408051/



Innovating new ways to support response and recovery.

https://www.diageo.com/

DIAGEO OUR BUSINESS OUR BRANDS IN SOCIETY INVESTORS CAREERS 23 MAR 2020 Diageo pledges more than eight million bottles of sanitiser for frontline healthcare workers World's largest distiller in unprecedented global response in the UK, Ireland, Italy, the USA, Brazil, Kenya, India and Australia Pledge aimed at overcoming shortages to protect frontline healthcare workers · Donation of alcohol is enough to produce more than eight million bottles of hand sanitiser 23 March 2020: Diageo, maker of Johnnie Walker and Smirnoff, has today pledged to enable the creation of more than eight million bottles of hand sanitiser, by donating up to two million litres of alcohol to manufacturing partners, to help protect frontline healthcare workers in the fight against COVID-19. The world's leading distiller will provide Grain Neutral Spirit (GNS) – a 96% strength ethyl alcohol used primarily in production of vodka and gin – and make it available at no cost to hand sanitiser producers in multiple countries, to help overcome shortages in healthcare systems. This donation will enable the production of more than eight million 250ml bottles of hand sanitiser.

Diageo continues to engage with national and local governments across the many countries where the company has major distilling operations. The spirit will be made available in supply chains according to

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Innovating new delivery mechanisms/ opening new revenue streams

https://www.boredpanda.com/ national-cowboy-museum-he ad-of-security-twitter/?utm source=google&utm medium =organic&utm campaign=org anic

These restaurants around Tampa Bay offer curbside cocktails to-go



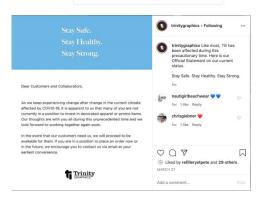
Photo by: Trophy Fish (left) | Miguelitos (right)





Information to Prepare Now to get Tampa Bay Back on Track







Opportunity for unique collaborations

Apple and Google partner on COVID-19 contact tracing technology



https://www.apple.com/newsr oom/2020/04/apple-and-goog le-partner-on-covid-19-conta ct-tracing-technology/



National Cowboy Museum: a lesson on being human, authentic.



https://www.boredpanda.com/ national-cowboy-museum-he ad-of-security-twitter/?utm source=google&utm medium =organic&utm campaign=org anic

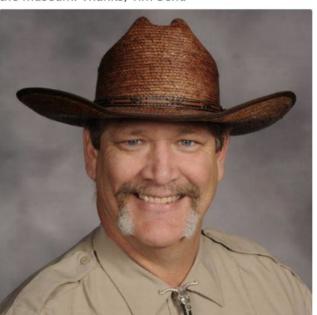








Hello, my name is Tim and I am the head of security for The Cowboy. I have been asked to take on the additional duty of social media management while the museum is closed. I'm new to this but excited. My team will also continue to protect and monitor the museum. Thanks, Tim Send



This is the hat and eyepatch the Duke wore in the movie True Grit. They are part of our Exhibition about the 2 True Grit. Lots of interesting props and clothes. I'm told I can't try it on. Hashtag John Wayne. Lucas, my grandson, told me to use hashtags. Thanks, Tim



○ 2,035 11:49 PM - Mar 17, 2020





And these are his boots. Hashtag John Wayne. Thanks, Tim



○ 1,313 3:17 PM - Mar 18, 2020





Image credits: ncwhm



ADAPTING TO THE NEW NORMAL

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Planning Guidelines

- **11** Keep your communications relevant & aligned with consumer priorities
- **12** Leverage data to gauge market readiness for your message
- **13** Seek innovation in operations AND how you communicate
- Plan, create a contingency (or two), be prepared to pivot

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Messaging Guidelines

- Be human above all let your values guide your messaging
- Don't leverage the crisis to your advantage consumers are too savvy for that
- **13** Add real, tangible value to consumers / society
- **14** Align marketing approach to new behavioral norms



THANK YOU

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