



Marketing in the Face of a Pandemic: How Brands & Consumers Can Stay Ahead of the Curve

Today's Speakers

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MMA is the Global Industry Association for Marketing

Started in 2003;
turned around in
2013

Operations in 15
countries

Marketer led; plus
media sellers, tech
and agencies

55+ team
worldwide

25+ conferences in
15 countries

EMEA





-  France
-  Germany
-  Middle East
-  South Africa
-  Spain
-  Turkey
-  United Kingdom



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-  Mexico
-  Brazil
-  Colombia
-  Argentina

APAC

-  China
-  Vietnam
-  India



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Who & What is the MMA All About



The People We Serve

Primary Audience

Pioneering Chief Marketers



Our Strategic Priorities

Measurement & Business Impact

Drive marketing effectiveness and the future of measurement for sustainable business growth

Marketer Org Development

Redefine marketing organization dynamics and future capabilities needed in a data

Inspiration

Lead marketing innovation and creative effectiveness/impact for mobile and emerging technologies

Advocacy

Establish standards and self-regulatory guidelines to improve consumer trust and confidence in marketing and connected devices



Our Reason for Being

Purpose

To enable marketers to drive innovation and enduring business value in an increasingly dynamic and connected-connected world.



MMA IS 800+ MEMBERS STRONG GLOBALLY

MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS





MMA Programs Transform Marketers Understanding of Marketing

The following are the core programs of the MMA

MMA Key Programs		Description
Key Think Tanks	1 Marketer Organization Think Tank (MOSTT)	Community of CMO & academics rethinking the modern marketing org; focused on measuring marketing org to financial performance. Soon to be featured in HBR
	2 Marketing Attribution Think Tank (MATT)	Community of marketing & analytics leaders committed to measurable impact & accountability by advancing people-based approaches in media measurement.
	3 Data in Marketing Think Tank (DATT)	Focused on supporting marketers in their ingesting, applying and success with data in marketing. Eventually, group is to be regulatory voice of CMOs on Data. In development
Funded Research	4 Brand as Performance (BaP) *	Industry consortium to first time ever measure the impact of Brand, a core element of marketing success. Will likely to produce a new growth framework for brands. (\$850k)
	5 First-Second Strategy (Cognition 2 study)	Groundbreaking new Cognition Neuroscience Research project set out to understand how consumers process information. Cog 2 will look at time's effect on impact.
	6 SMOX (Modern Marketing Mix)	Series of 14 studies that examine mobile's role in a multi-channel (TV to mobile) world, with empirical evidence on dynamics of the modern marketing mix.
	7 Location Privacy Alliance (LPA) *	Focused on development of a Hippocratic Oath for the application of location data to marketing. Second phase is developing regulatory education materials
Key Member Councils	8 Mobile Fraud Tool & Council *	Member council created better help our members stay ahead of Mobile marketing fraud by assessing, evaluating, and combatting Fraud. Fraud assessment tool coming.
	9 Brand Safety Council (SAVE)	Marketer-led council created to ensure safeguards for brands in all marketing environments, to protect the brand's reputation and marketing investment.
	10 RCS/SMS/OTT Messaging	Member Committee focused on the roll-out of RCS across the US, and preparing an "RCS Center of Excellence" that issues regular guidance on this new function.
	11 MMA Events	35+ event across 16 countries globally, from 350 to 2,000 attendees.
	12 MMA Smarties	Awards Program that offers marketers multiple opportunities to showcase their best work in modern marketing around the world. Includes a business impact index

* Obligations to sponsors

MMA COVID-19 Marketer Support Hub

#WeAreInItTogether

The most comprehensive central resource for information on the coronavirus pandemic as well as guidance for brands on how to navigate marketing during the worldwide crisis. Information is constantly being curated and loaded in real time, the hub is searchable by the different regions the MMA serves (North America, APAC, EMEA and LATAM) and includes:

- 1 An aggregation of critical information on Covid-19's impact around the world
- 2 Tools and tips for managing teams remotely, crisis guidance as well as programs to support small businesses
- 3 Marketing and advertising best practices and current consumer trends to help brand members make more informed decisions
- 4 Some light moments with staff picks on the humorous videos and memes circulating

We'd love to include your content.

If you are an MMA Member with Resources / Programs / Research that is focused on helping brand marketers, we'd love to include your information in the hub,



Please visit <https://www.mmaglobal.com/marketersupporthub/weareinitttogether>



|| Asking Questions, Sharing Insights



#MMA
#WeAreInItTogether
#ShapeTheFuture



Marketing in the Face of a Pandemic
June 25, 2020



Michael Della Penna
Chief Strategy Officer



Kalpana Sehwan
VP, Client Strategy

Overview

- InMarket Intro
- COVID-19: Macro Consumer Trends & How Marketers can respond
- COVID-19: Industry Trends, Challenges, Opportunities
 - Banking
 - Retail
 - CPG
 - QSR/Dining
 - Gyms/Fitness
 - Summer Travel
- C19 Evolving Consumer Sentiment



INMARKET INSIGHTS

Brief:
COVID-19 Beer Brand Buzz

10 Years of Recognition as the Location Experts



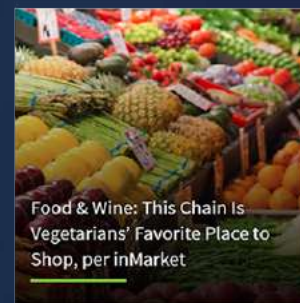
WINNER – 2019 DIGIDAY AWARD
BEST MOBILE MARKETING
PLATFORM



WINNER – 2016 IAB MIXX
GEO-TARGETTING



Forbes



Experience delivering
ROI to the world's
top brands



Hyper-accurate,
first-party, SDK derived
location data

*50,000,000+ active
monthly users
*reportable in Comscore
Media Metrix® Multi-Platform

IN|MARKET

InSights Covered Today & Sources

What People **SAY**



Consumer Survey via InMarket
Owned & Operated Apps

What They **DO**



InMarket SDK Data

What They **BUY**



InMarket Purchase Data –
Credit Card/Debit Cards and
Scanned Receipts

Audience Poll

What category does your business fall under?



Brand



Agency



AdTech/MarTech



Other

What People SAY



Pandemic will **last longer**



expect C19 to last 6 months or more



Expect the impact on economy to be severe but are **more optimistic**



in June vs 58% in March



Returned to **shop in-store**



have returned to grocery stores



Online/Multi-channel shopping more common



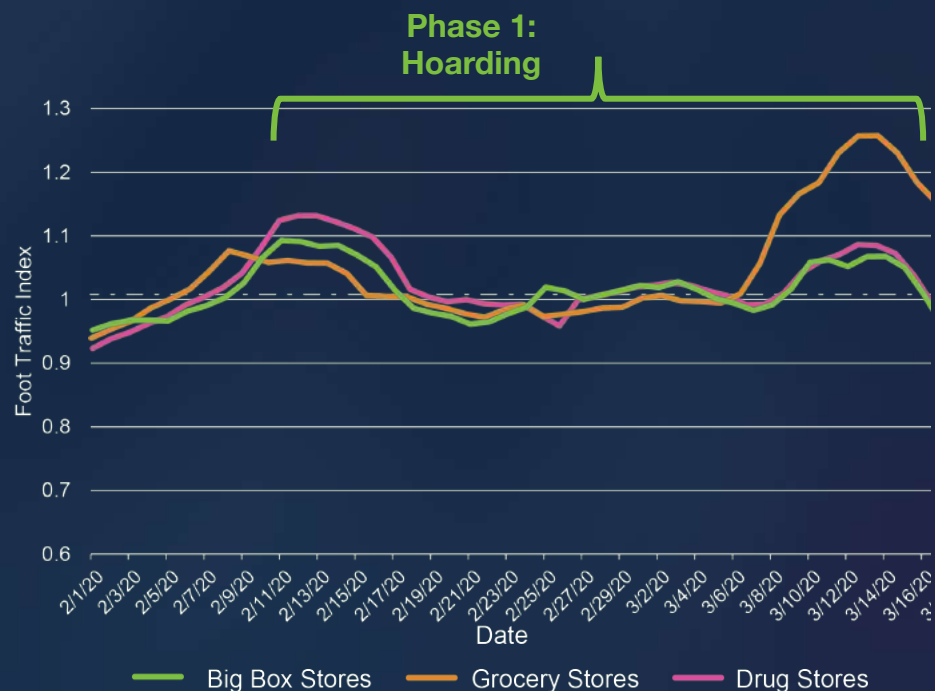
shop both online and offline for grocery and big box

What Customers DO



Phase 1: "Hoarding" Macro Category Trends

Same Day Week over Week Credit/Debit Transactions



- **Spending spikes** around key COVID-19 announcements & developments
- **Key Categories:** Grocery, Big box, Discount retail and Pharmacy categories
- **Delivery & Online services** showed the most notable increase trend
- More than half of online grocery shoppers made their **FIRST ever online grocery purchase this year**

Week of March 1: Individual states declare states of emergency -- 3-day double-digit increase in overall week-over-week spending

Date	Restaurants	Delivered Services	Gas Stations	Grocery	Big Box	Retail (General)	Online Shopping	Discount Retailers	Pharmacy	Total Spend
2020-03-03	-21.95%	-34.95%	90.43%	14.92%	165.55%	27.58%	-6.90%	-19.55%	45.83%	30.98%
2020-03-02	12.75%	-29.55%	25.85%	78.90%	49.92%	29.31%	144.64%	134.62%	6.50%	49.24%
2020-03-01	118.39%	-76.14%	44.00%	14.13%	-28.17%	-31.25%	338.71%	300.00%	33.33%	86.14%

Phase 1: Hoarding Macro Category Trends

Same Day WOW American Purchase Trends

Purchase trends week over week highlight the COVID-19 announcements' impact on consumer purchase behaviors

- **Alcohol** remains in the top 3 products increases - with a 50% the first week alone
- **Canned & Frozen foods** maintained double digit increases
- **Nonperishables** – such as dried beans & canned milk remained strong
- **Household, office & cleaning** supplies grew
- **Tobacco** a panic purchase staple
- **Product alternative** purchases began to appear

2/16/20 - 2/22/20	
Product Category	Change from Previous Week
Refrigerated	63.5%
Sparkling	54.1%
Rum	34.8%
Light Bulbs	23.1%

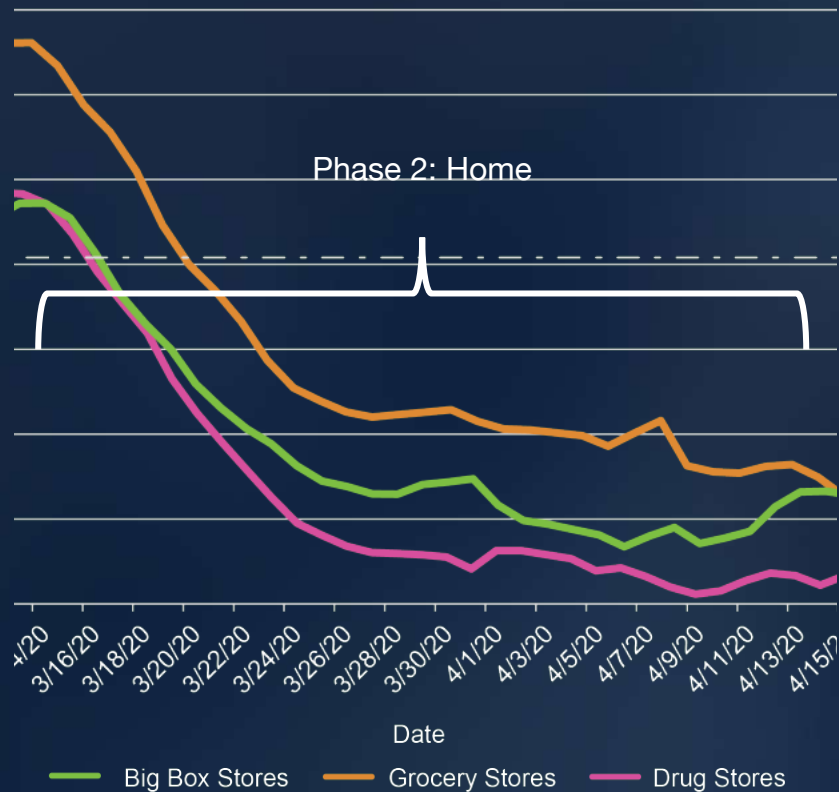
2/23/2020 - 2/29/2020	
Product Category	Change from Previous Week
Tobacco	37.4%
Refrigerated	35.8%
Vodka	32.1%
Rose	26.1%

3/1/2020 - 3/7/2020	
Product Category	Change from Previous Week
Canned Milk	42.9%
Lamb	15.3%
Seltzers, Tonics & Soda Water	13.4%
Outdoor Grilling	3.9%

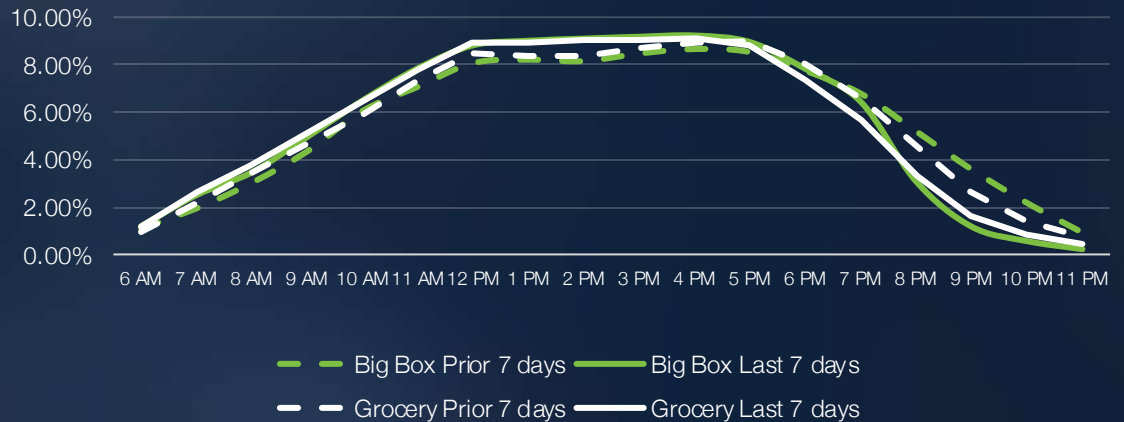
Phase 2: Home – The New Normal

Visit Trends

In-store visits see a decrease, while shopper behaviors transform



Hourly Foot Traffic (Weekdays)

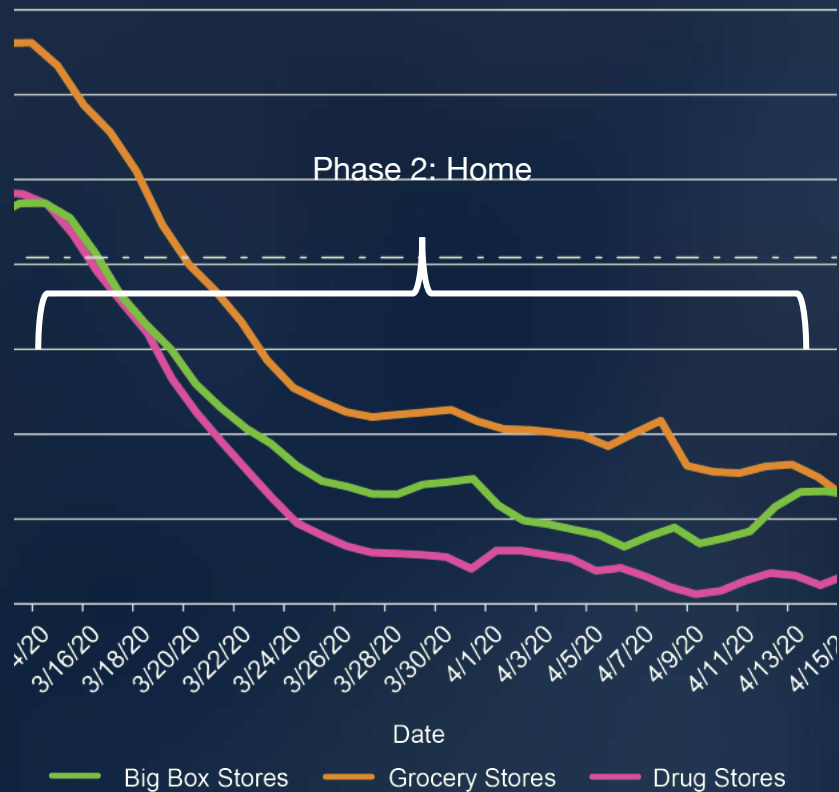


- **Double-digit increases** in morning visits week-over-week
- **8AM-12PM** - ideal window to shop for high-demand products
- **4PM** is peak hour for grocery shopping traffic
- **Grocery** saw 50%+ less traffic than peak hours, with **Big Box** at 33%-50%

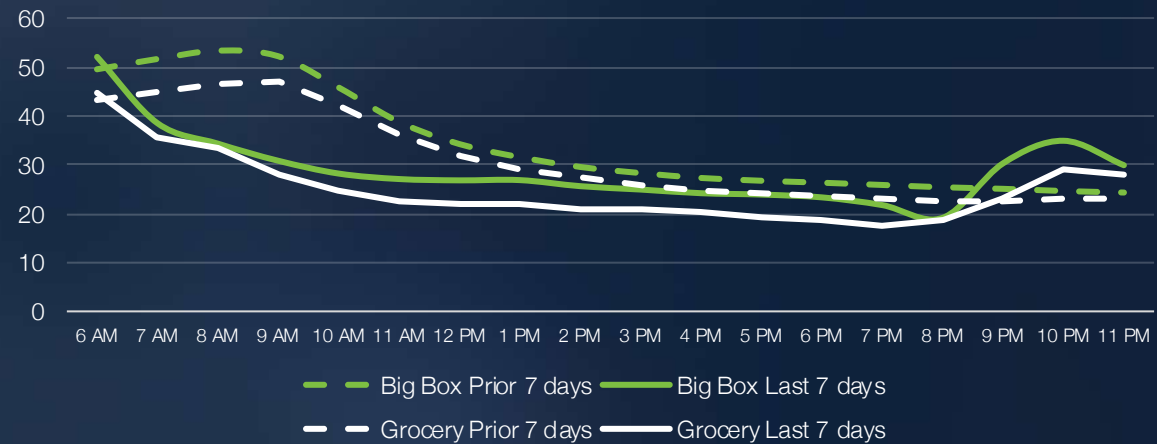
Phase 2: Home – The New Normal

Visit Trends

In-store visits see a decrease, while shopper behaviors transform



Dwell Time (Minutes)



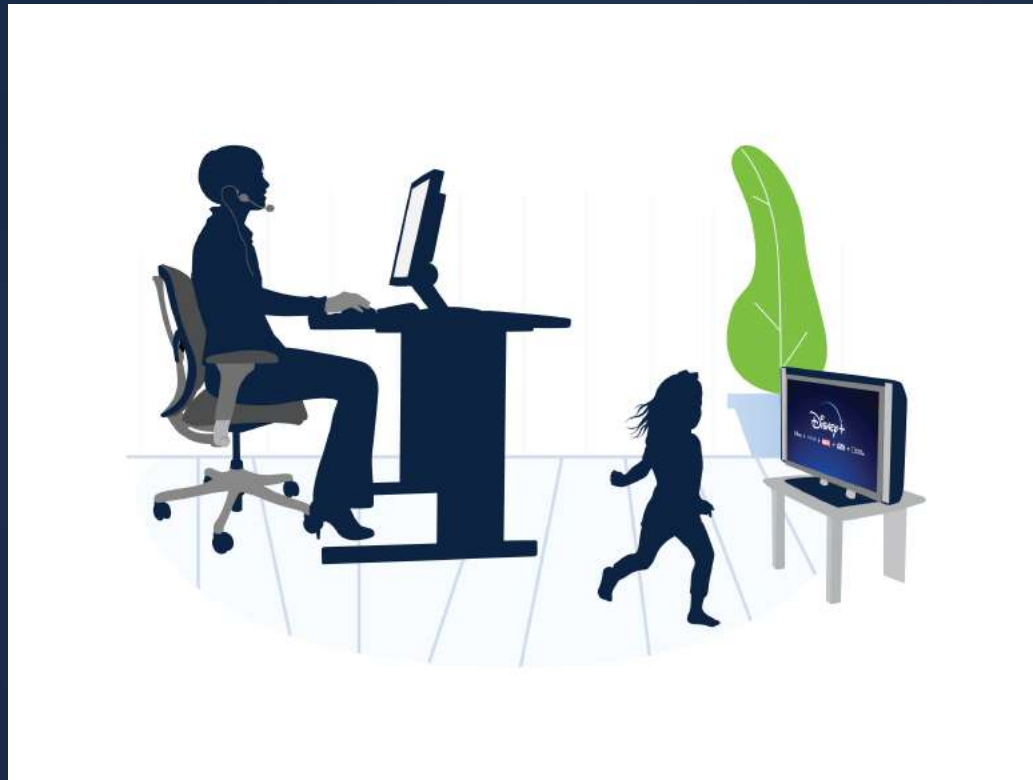
- **Morning shoppers** spend more time in-store than other shoppers
- **Overall** time spent in-store dropped as COVID-19 spread increased

Phase 2: Home – The New Normal

Work, Entertain & Cook at Home

Purchase Trends

- **Longer Shelf-life** products remain pantry staples
- **Alcohol** remains in top purchase increases WOW
- **Herbs & Spices** continue growth as people cook more
- **Lawn & gardening** up 45%+ WOW
- **“Spring cleaning”** is in full effect
- **Streaming services** increase by 93%+



108%

increase in
office
electronics

117%

increase in
TV & Home
Theatre

Phase 2: Home – The New Normal Self-Care

166%

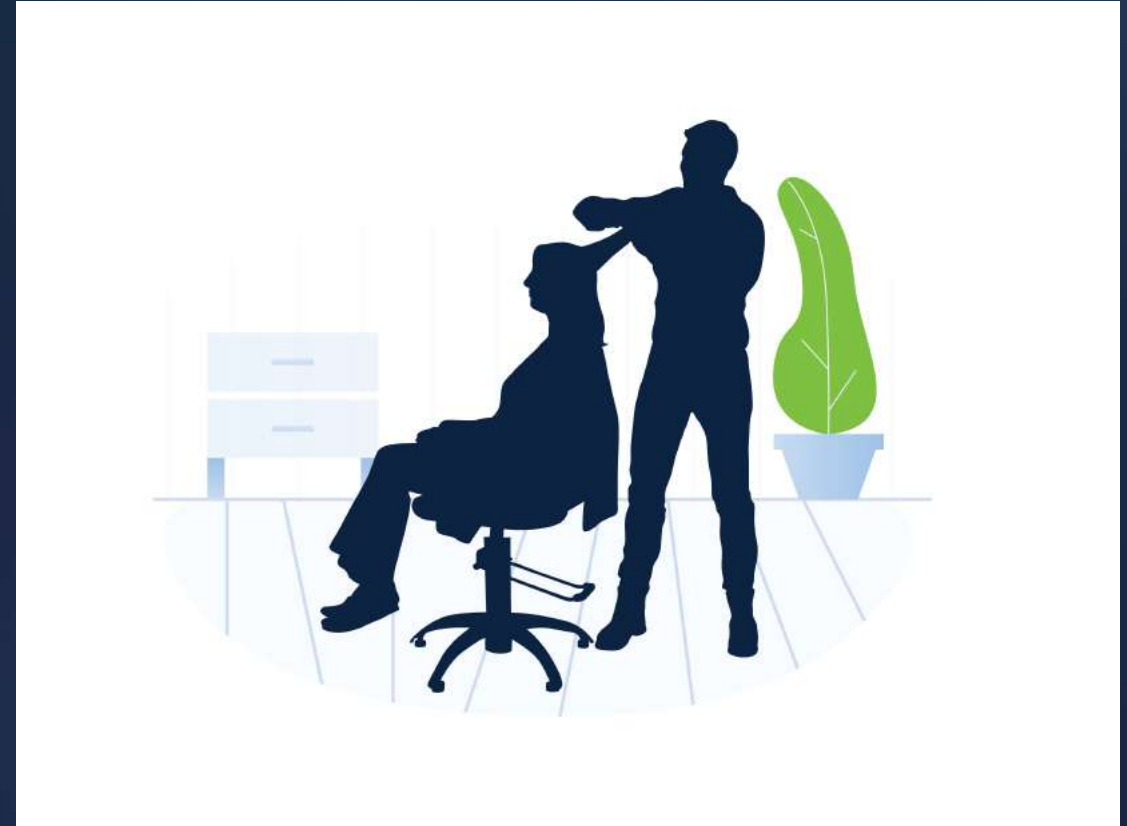
increase in
Hair clipper
purchases

150%

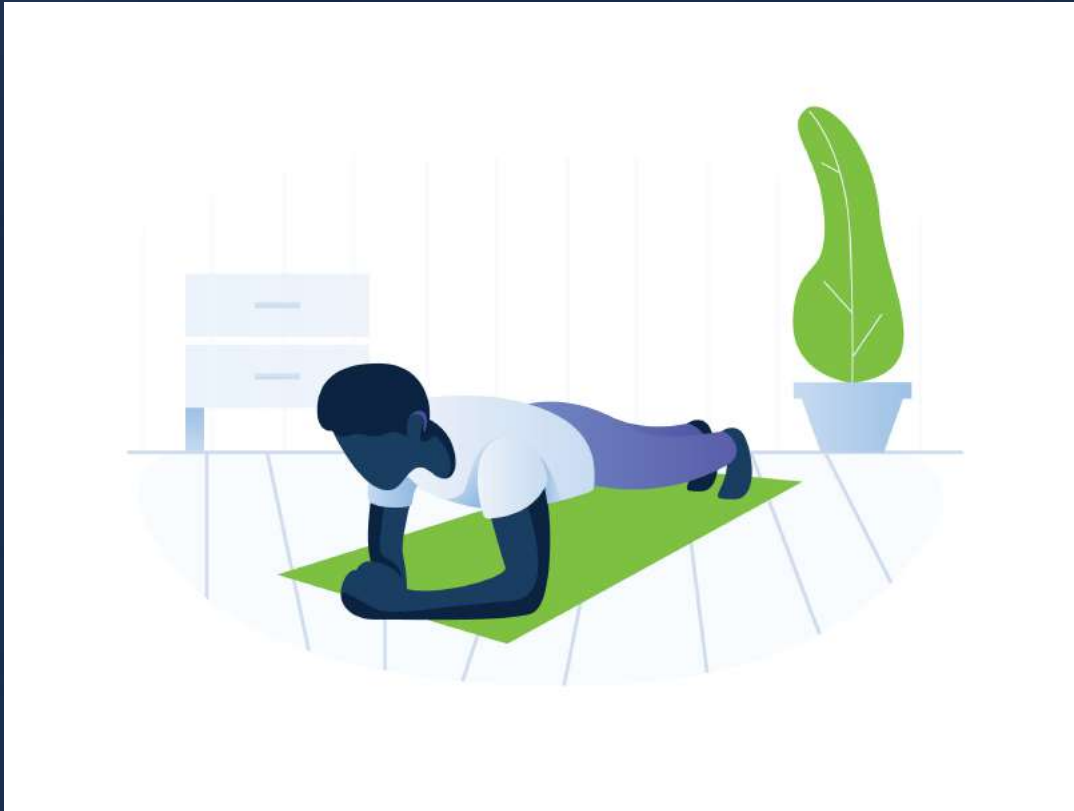
jump in
online nail
care orders
in April
alone

23%

increase in
hair dye
products



Phase 2: Home – The New Normal Self-Care



40%

increase in
streaming
Amazon
fitness
apps

94%

increase in
Peloton
Fitness
Consumers

64%

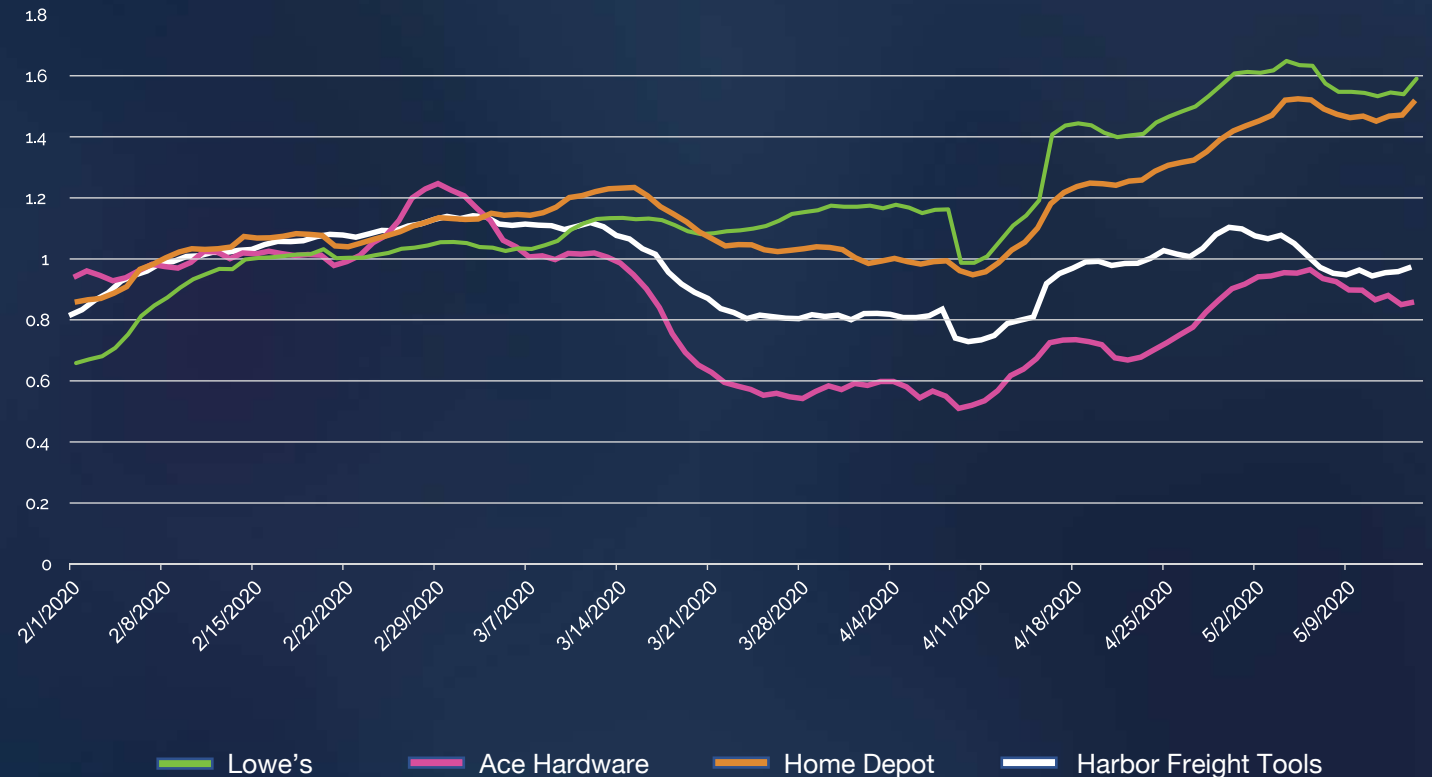
increase in
Peloton
App.
Consumers

Phase 3 – Hope & the Hyper-purchase

As states/counties re-open, where are consumers going?

- Nail Salons
- Gyms
- Parks & Beaches
- Home Improvement stores

Home Improvement Stores see visitation increase over pre-COVID-19 levels

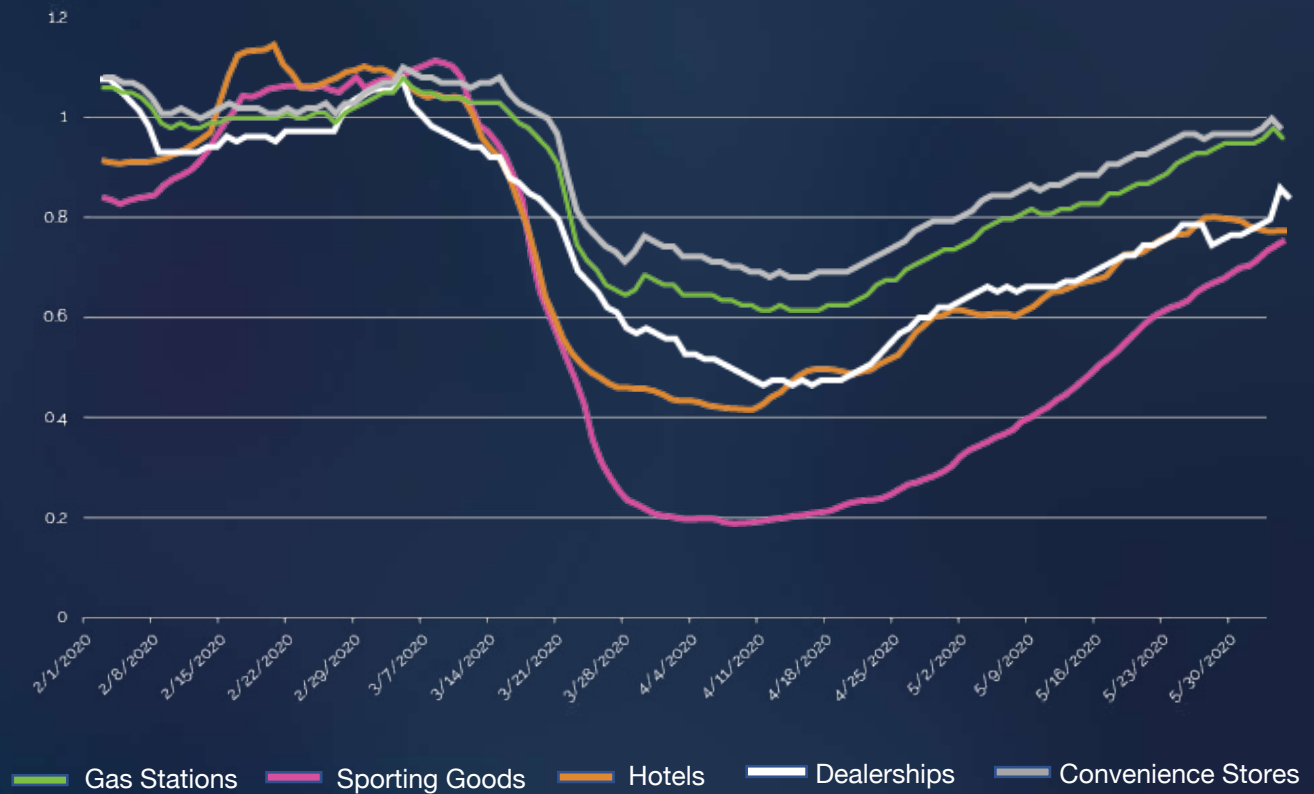


Phase 3 – Hope & Summer Travel

As states re-open,
where are consumers
going?

- Parks & Beaches
- Gas Stations
- Convenience Stores
- Auto Dealerships
- Sporting Goods Stores
- Hotels

Summer travel focused locations see
foot traffic increases post-quarantine



COVID-19's Impact on Summer Travel

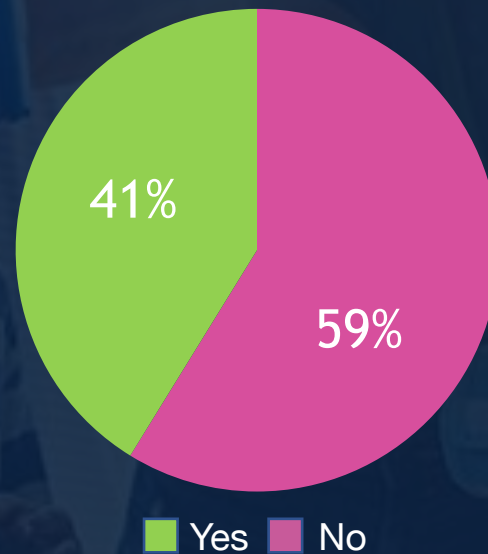
Summer Plans

- Nearly 60% surveyed said Covid-19 has impacted their summer plans

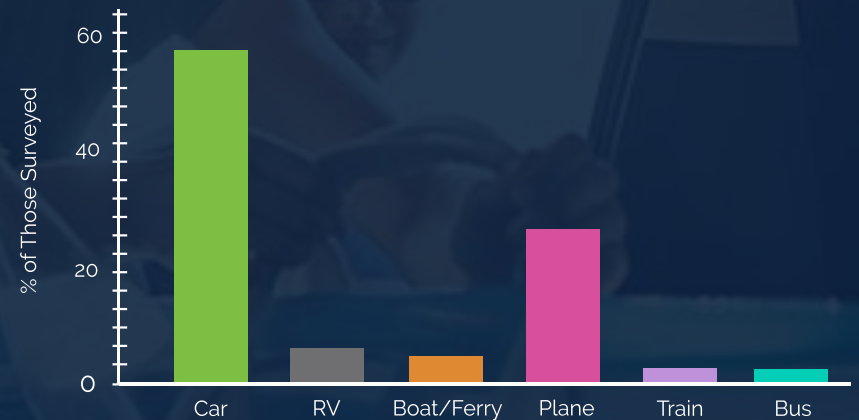
Summer Travel

- Road Tripping will be the summer vacation of choice with 57% planning to travel by car
- In-state road trips seem to be in order with 34% planning to drive 100-500 miles
- With improved cleaning rules, many are now comfortable staying at a hotel/motel with 35% of those surveyed planning a hotel stay

Did COVID-19 Change Your Vacation Plans?



How Will You Get There?



Phase 3: Hope & Summer



10%

increase in
Sunscreen
& Tanning

80%

increase in
Rosé
Wine

54%

increase in
Refrigerated
Snacks

COVID-19 How Marketers Can Respond to Consumer Needs



Be authentic



Continue to message –
customers need re-assurance



Maintain Share of Voice to
protect Share of Market



Innovate & Invest in technologies to
improve customer convenience and
safety

INDUSTRY VIEW

Visit Trends, Sales Trends, Challenges and Opportunities

Audience Poll

How often do you include location in your marketing or media strategies?



Never

Sometimes

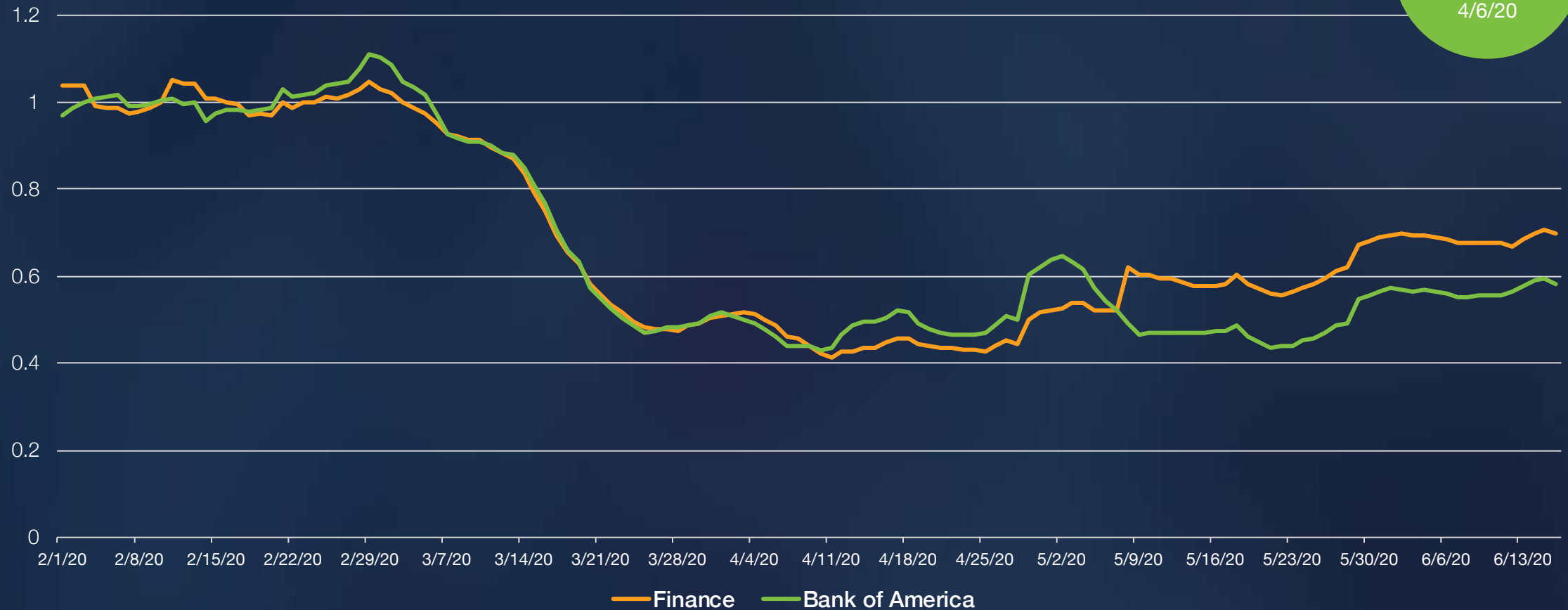
Often

Rarely

Always

Visit Trends – Bank of America

20.4%
Increase
Since
4/6/20



Banking: Challenges, Opportunities & Content



Challenges

- Safety & Health
- Ensuring customers still get the service they need/expect
- Fraud and security



Opportunities

- Implement and social distancing at retail locations
- Invest in fin-tech- online banking **jumped 98%** during C19. Improve UX and call center support
- Double-down on encryption and security

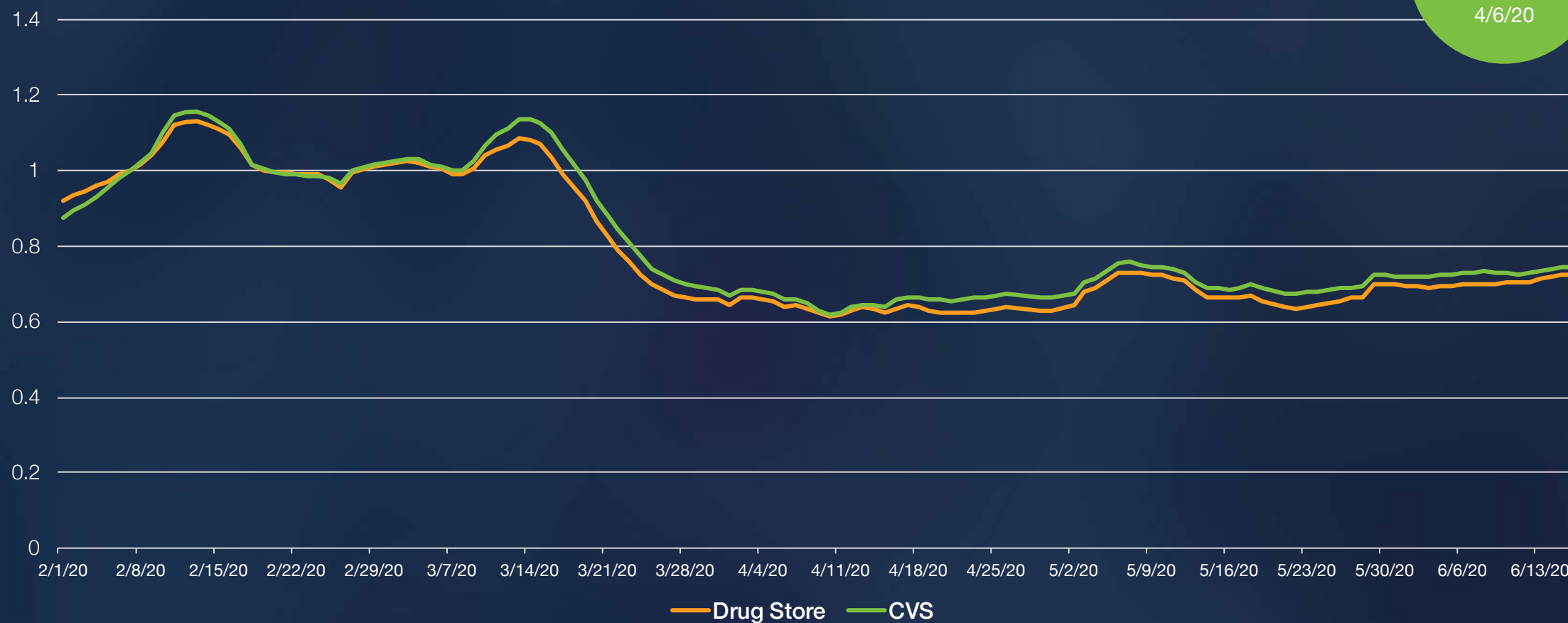


Content / Messaging

- Communicate social distancing measures
- Offer online banking step-by-step tutorials/videos
- Build awareness of improved security and privacy

Visit Trends – CVS

11.7%
Increase
Since
4/6/20



Pharma/Drug Store: Challenges, Opportunities & Content



Challenges

- Prescription meds – timely delivery
- Employee and Customer Safety
- Consumer anxiety due to no/low inventory for health essentials - masks, sanitizer, gloves, thermometers



Opportunities

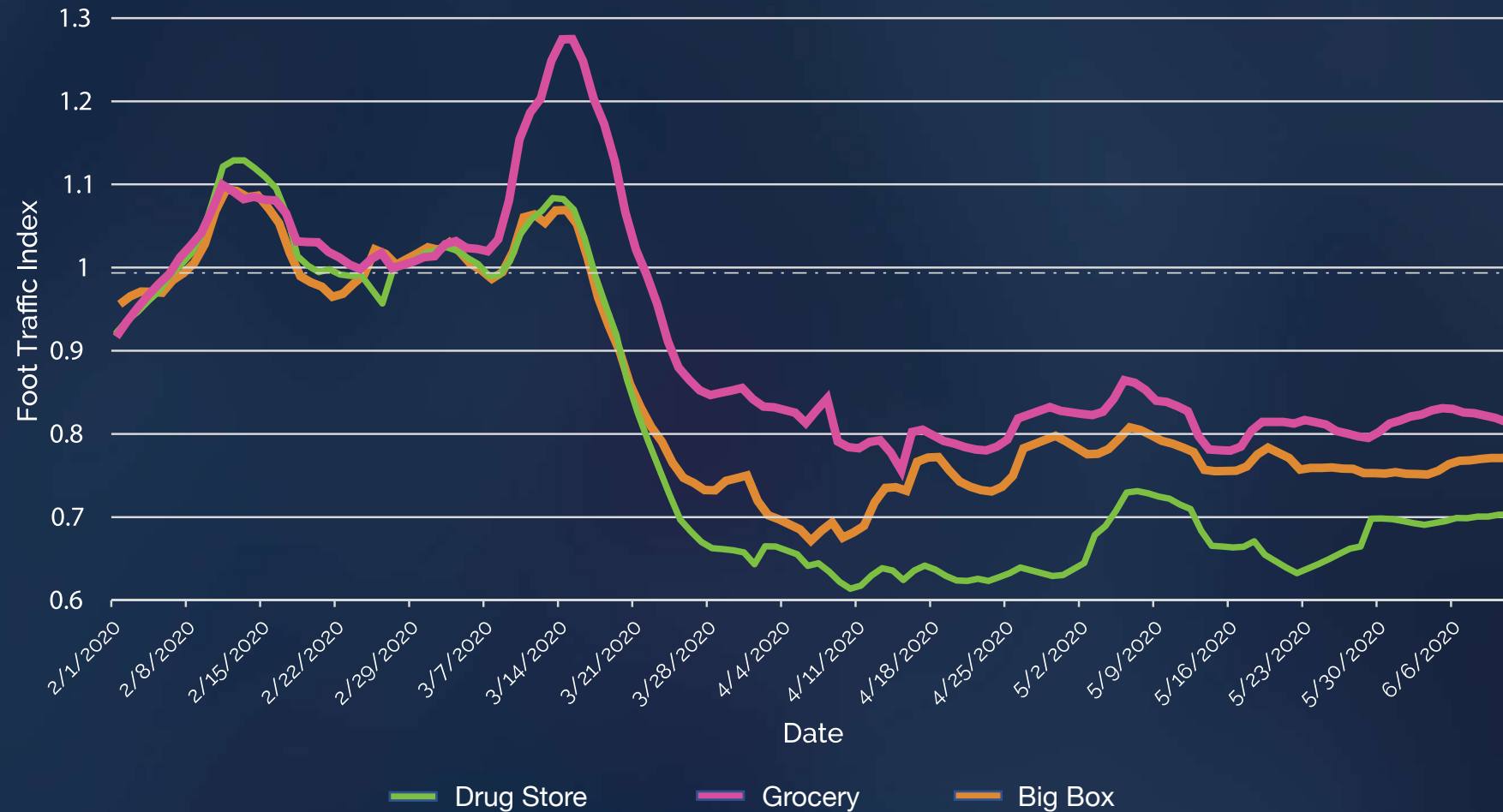
- CRM technologies for refill alerts; connect HCP with patients
- Virtual tele-health sessions, drive-through, curbside and delivery
- Leverage Inventory Optimization Tech



Content / Messaging

- Communicate options for refills and opt-in reminders/alerts
- Leverage localized media to build awareness of options for customers to safely get the care they need
- Include delivery options, and special hours in creative messaging

Retail Visit Trends



Retail – Challenges, Opportunities & Content/Messaging



Challenges

- Inventory issues leading to customer anxiety
- Shelter In Place orders and social distance guidelines
- Employee and Customer Safety



Opportunities

- Leverage Inventory Optimization Technologies & improve e-comm – **online Grocery sales +37%*** in April and **+3% in order size**
- Architect in-store customer flows to enable 6ft social distancing
- Focus on delivery, order for pick-up, dedicated hours for high-risk customers



Content / Messaging

- Clearly communicate hours and policies, highlight available inventory upfront if possible
- Message customers in-store and prior to arriving to set expectations of wait times
- Promote delivery options, Click To Cart and special hours in creative

Retail Winners

Walmart 

74%

Increase in e-Commerce Sales

- Online Grocery Pickup (OGP)
- Expanded Delivery solutions
- Dedicated early hours for high-risk customers

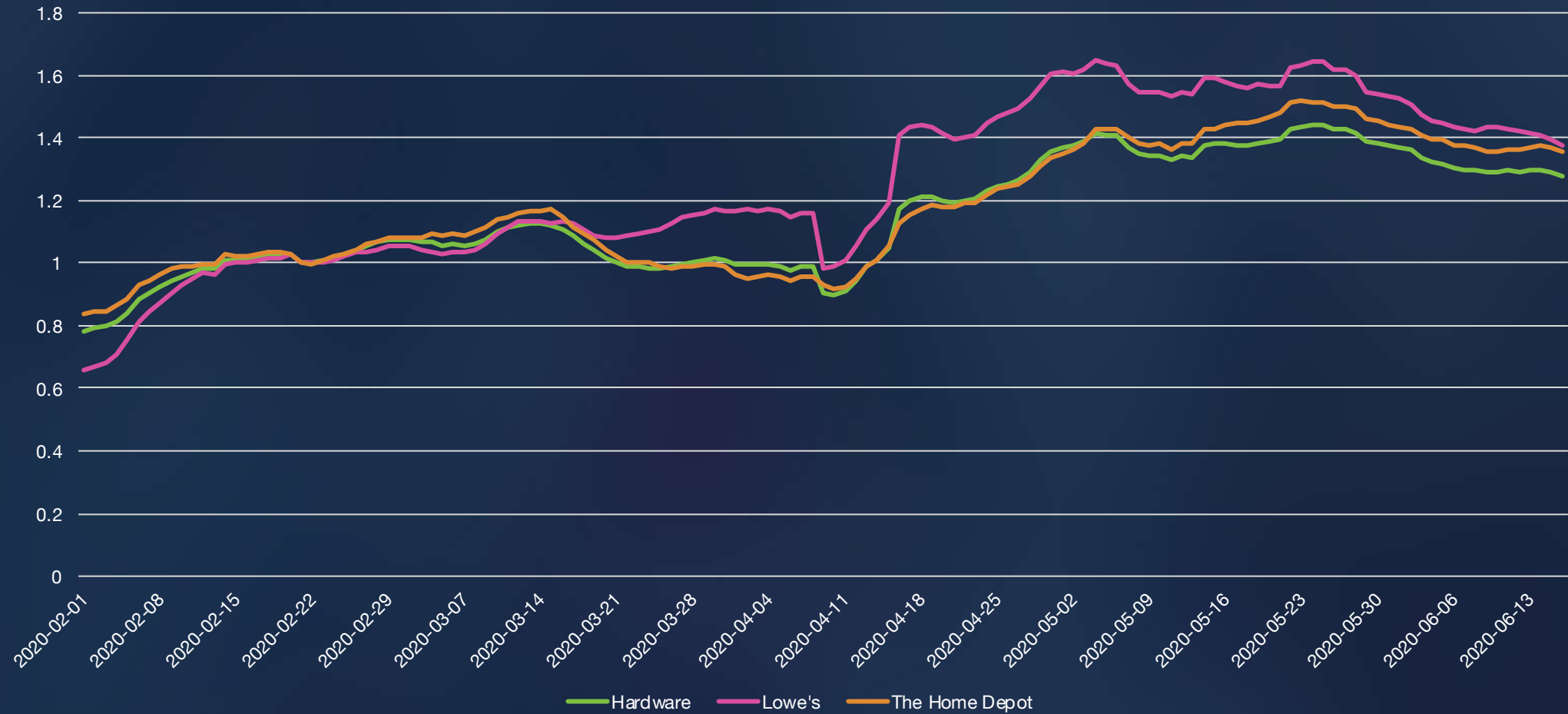
Kroger 

92%

Increase in digital sales in Q1 2020

- Order for Delivery
- Testing Order for Pick up Store only
- Improved Employee Safety
- Improved customer flow for 6ft Social Distancing

Specialty Retail – Hardware Stores



CPG – Challenges, Opportunities & Content



Challenges

- Customer anxiety due to empty shelves and inability to find once abundant supplies
- Higher risk of brand switching
- Customer, Employee & Retail Partner Safety



Opportunities

- Leverage Inventory Optimization Technologies
- Enhance channel strategies, include Click To Cart with optimizations for bundling and/or substitutions
- Highlight & innovate with delivery options



Content / Messaging

- Highlight Click to Cart and delivery options in messaging
- Ensure retail partner inventory optimizations are leveraged and highlight substitute products
- Leverage CRM solutions for replenishment alerts for delivery or test subscription models



CPG Winners

Paper Products

3X Sales

Hand Sanitizers

+54%

Disinfectants

+19%

Online Alcohol-Bev
Sales

243%

in Past Month*

Shelf Stable

Oat milk Sales

+300%

Hair Clippers Sales

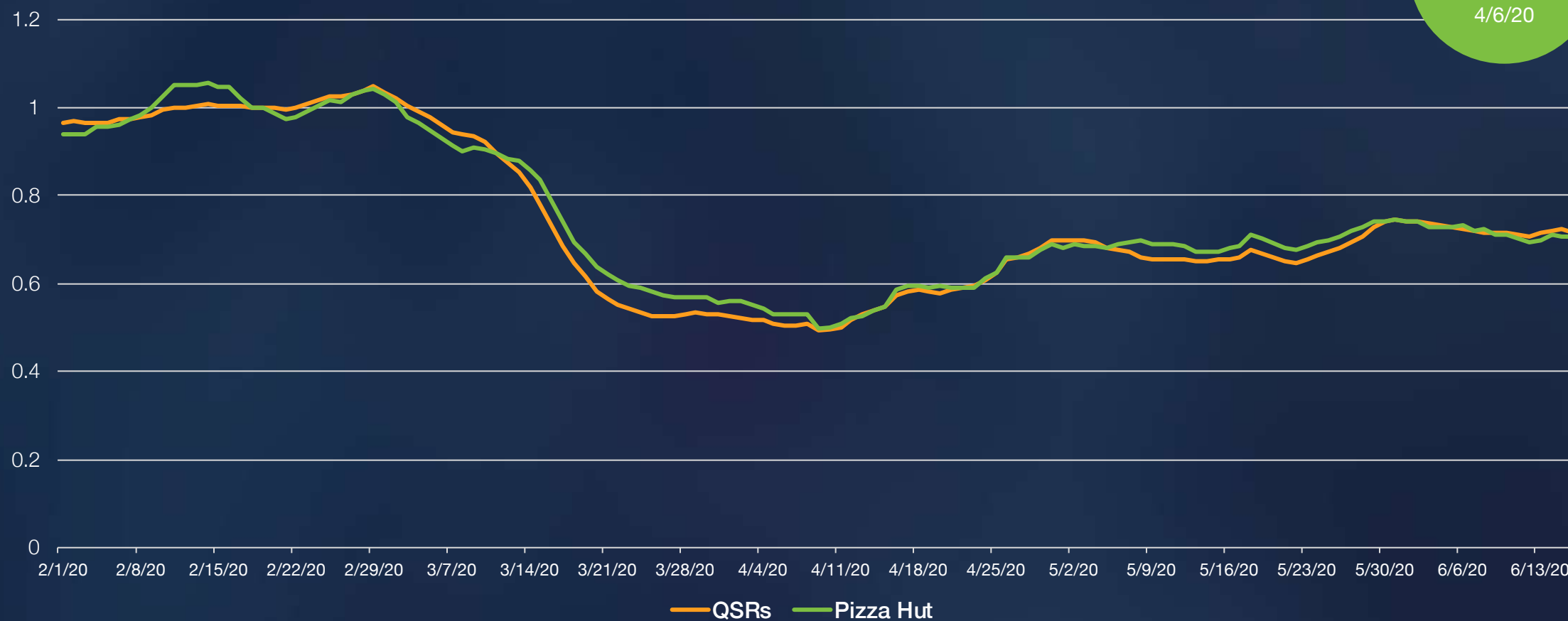
+166%*

Hair Dye Sales

+23%*

Visit Trends – Pizza Hut

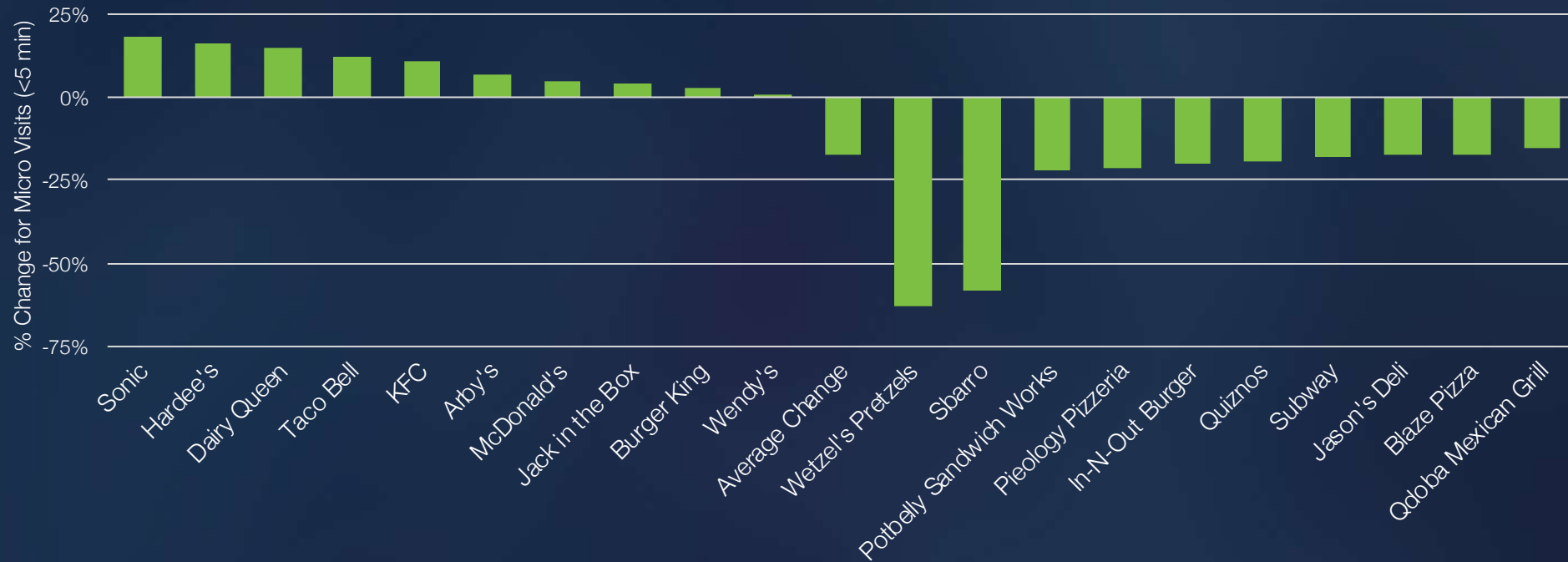
24.7%
Increase
Since
4/6/20



QSR Visit Trends – “Home” Phase

Lockdown vs Pre-Lockdown

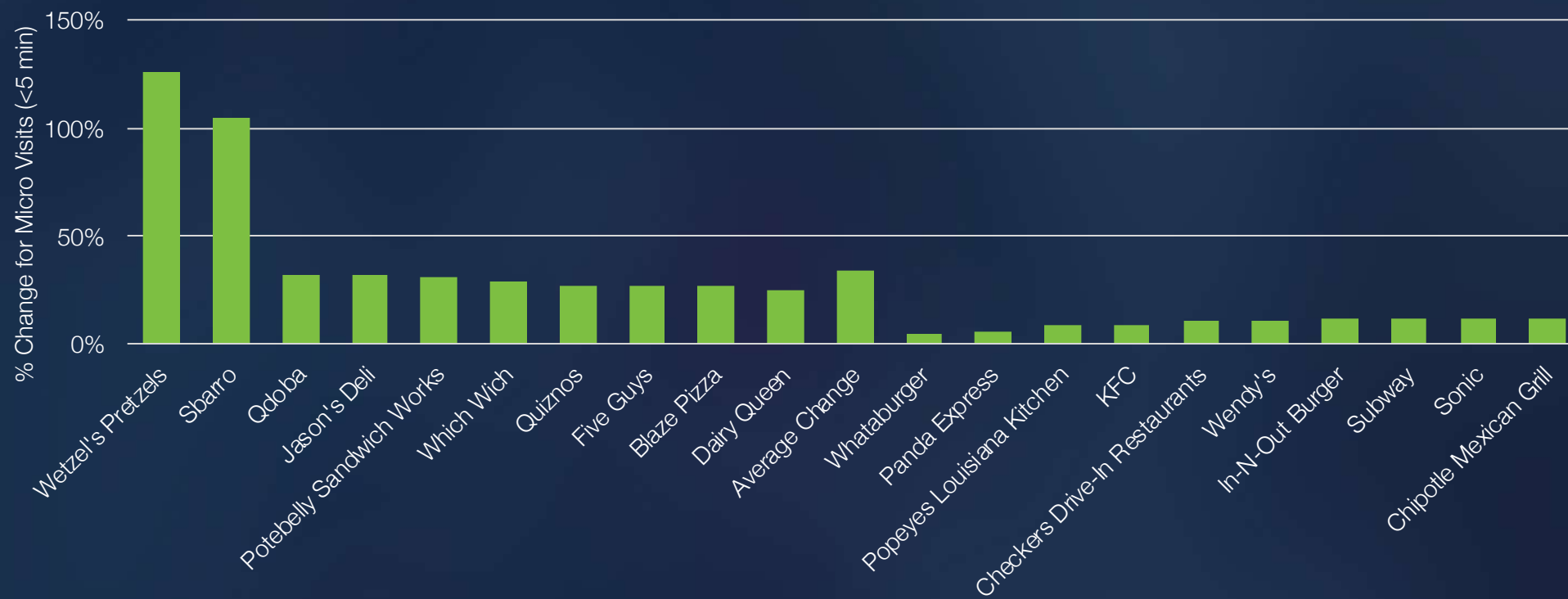
4/7-5/5 vs. 3/10-4/6



QSR Visit Trends – “Hope” Phase

Post-Lockdown vs Lockdown

5/6-6/2 vs. 4/7-5/5



QSR – Challenges, Opportunities & Content



Challenges

- Safety of diners and employees
- Establishing and messaging business hours & delivery partnerships
- Maintain supply chain relationships as demand decreases



Opportunities

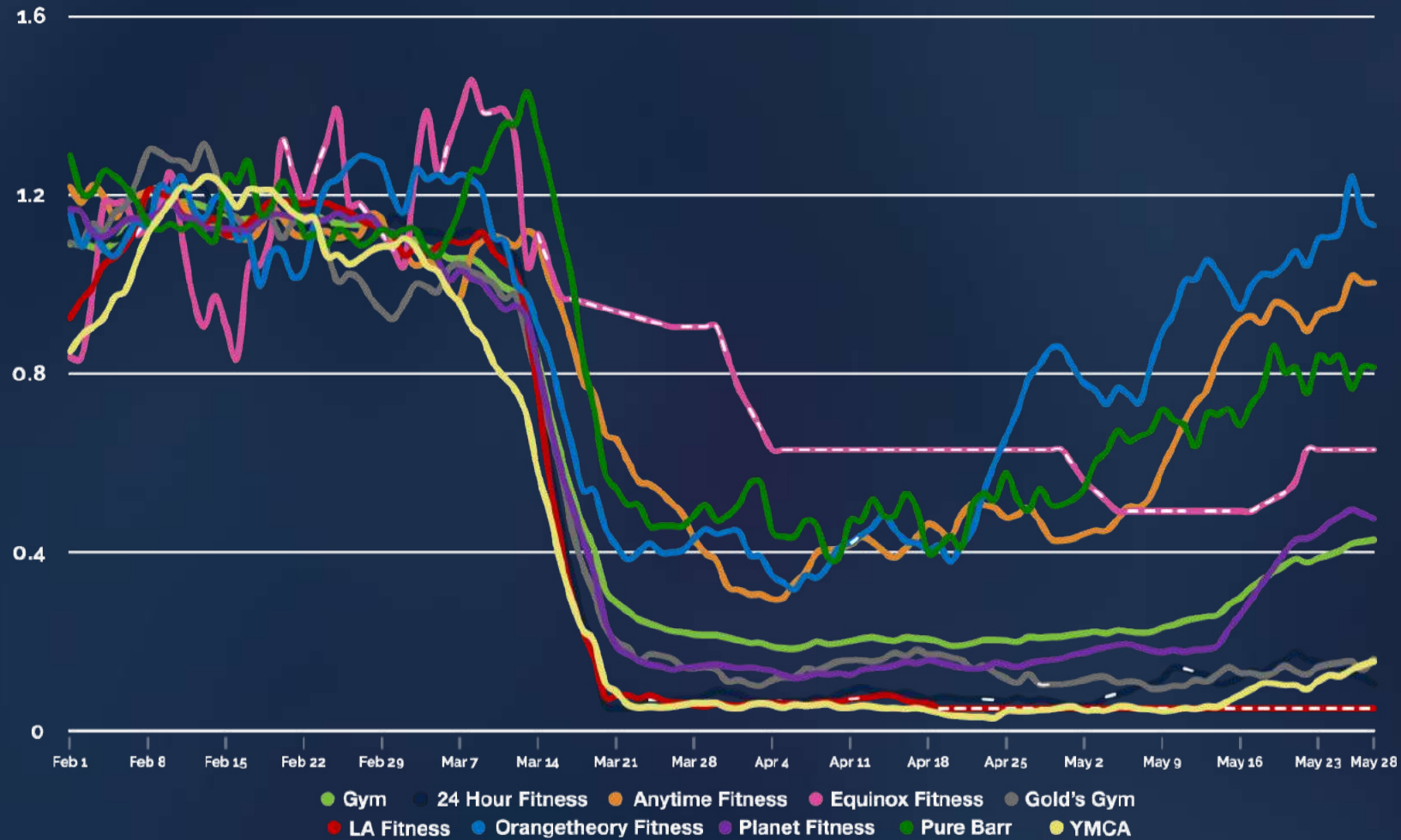
- Highlight & upgrade drive-thru options, curbside pick-up, and delivery partnerships
- Consistent and wide-reaching messaging – beyond window signs
- Discounts and offers, expand to pantry boxes (Subway & Panera); Fast Casual also offers Beer and Wine to go



Content / Messaging

- Message measures taken to ensure quality and safety of food services
- Maintain Share of Voice to ensure Share of Market doesn't get eroded
- Give customers a reason to order out! Many need a break from cooking at home – offer family value meals or special treats

Gyms/Fitness Visit Trends



Dashed Lines Indicate Simulated Data

Gyms – Challenges, Opportunities & Content



Challenges

- Shelter In Place Orders only easing now
- Member fear of safety and health Concerns
- Engage full member clientele avoid cancellations



Opportunities

- Highlight upgraded cleaning measures
- Clearly communicate physical distance parameters in-location
- Offer Virtual Classes via Zoom, Facebook Live or other platforms



Content / Messaging

- Message measures taken to ensure safety of members and staff
- Make reservations seamless via app or call service
- Clientele are looking for ways to stay healthy, highlight new app features and/or classes that help manage stress and anxiety

COVID-19 Changing Consumer Sentiment

	Banking	Pharma	Big Box	Grocery	Dining	Hardware
Online during C19	91%	84%	101%	94%	204%	51%
In-Location during C19	-46%	-22%	-21%	-14%	-59%	-38%
Do Both Online & In-Location	-33%	-4%	-8%	2%	-36%	-25%

Recommended Channel Strategies

Reach audiences at home to ensure your brand stays top of mind, maintain Share of Voice to protect Share of Market



TV / OTT

- Consumers are watching more news
- 42% are watching more Broadcast TV
- Target consumers at home
- Focus on safety and how consumers can connect safely



Radio

- Promote localized messages (hours, delivery) via local radio



Digital

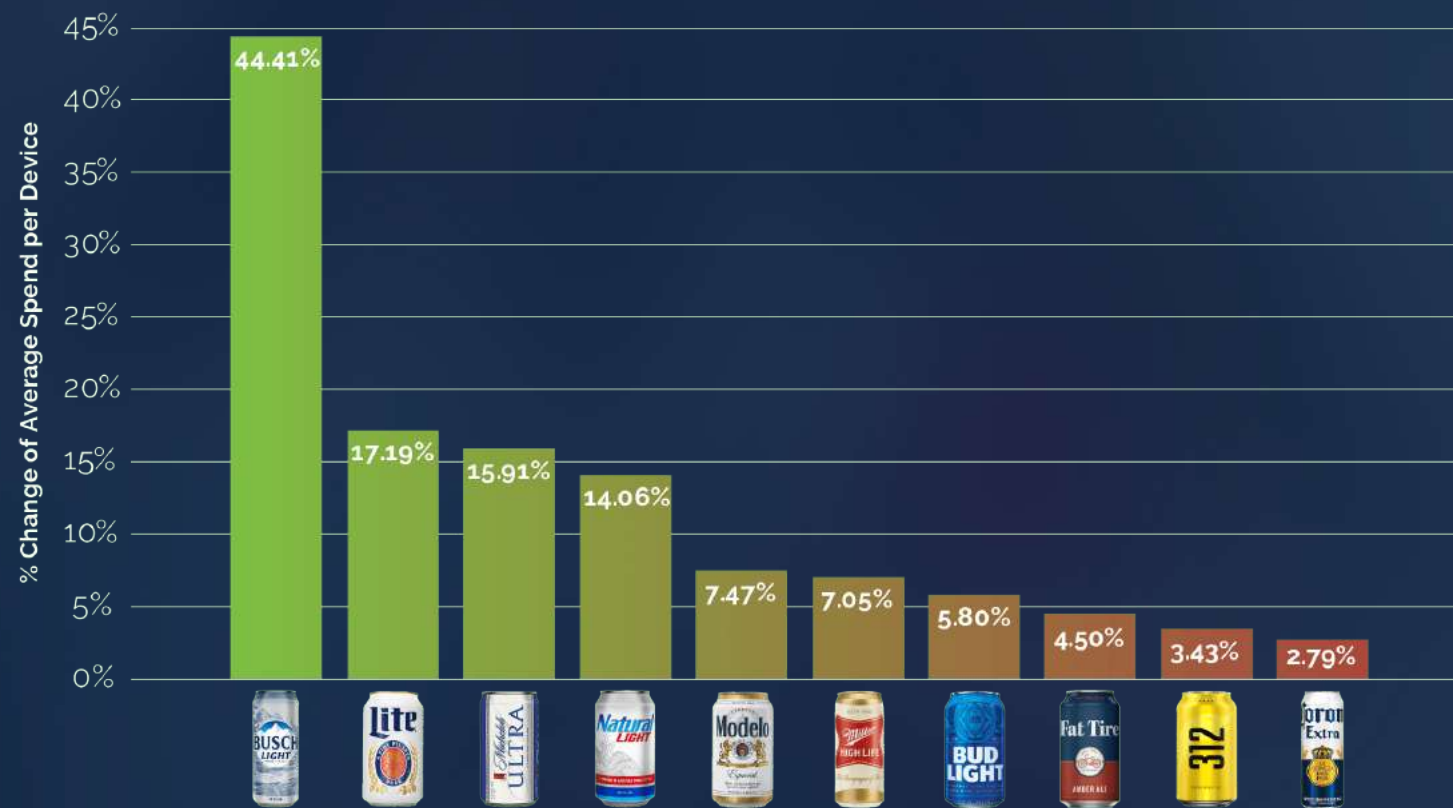
- 39% report watching more videos online
- 38% stream more TV/films
- Engage consumers at home, based on content, demographics and psychographics
- Readership for local & established news has increased



Mobile

- Re-target recent customers to your/competitor locations
- Target by audience demo and psychographics
- Promote local delivery options and hours to consumers at home in close proximity
- Target customers at home, on way to store or in-store
- Target based on past purchases

How Brands Benefited from Changing Behaviors



- Value beer has seen limited YOY growth
- Due to C19 consumers' focused on value and light calories
- Several domestic light beers benefited – most impressively Busch Light
 - Creative messaging, with a timely localized tie-in – snow promo and foster dogs



IN|MARKET INSIGHTS

Brief:
COVID-19 Beer Brand Buzz



IN|MARKET INSIGHTS

COVID-19:
Spirits and Wine Impact Report



IN|MARKET INSIGHTS

**When to Shop &
Why Time of Day Matters**



IN|MARKET INSIGHTS

COVID-19:
Gym & Fitness Impact Report



IN|MARKET INSIGHTS

COVID-19:
Behaviors Before & After
Impact Report



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**How Is COVID-19 (coronavirus) Affecting
Consumer & Shopper Behavior?**



IN|MARKET INSIGHTS

COVID-19 Impact Report:
The New Normal



IN|MARKET INSIGHTS

COVID-19:
QSRs Impact Report

Stay ahead of the curve
Visit the InMarket COVID-19
InSights center
InMarket.com/covid19

And, for more of our exclusive InMarket
InSights reports, please visit
InMarket.com/insights

IN|MARKET
INSIGHTS

Q + A



THANK YOU

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 Thank you!