

*Making brands matter in turbulent times:*

# HOW TO STEER BRANDS THROUGH A CRISIS

Beyond COVID-19

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**UPDATED**  
1 April 2020



Ogilvy



**CHRIS REITERMANN**  
*Chief Executive,  
Asia and Greater China*

“

## Welcome to version 2.0 of our report...

On February 24th the COVID-19 crisis was still largely a China issue with only 2,069 infections elsewhere. Now as we publish this updated version, the US and Italy have overtaken China and we have moved from a regional problem to a global pandemic with over 930,000 infections and still rising.

It is an historic event posing never before experienced challenges to humanity, economies, countries and companies. We have seen amazing stories of people connecting, governments stepping up and brands contributing to the efforts to contain this virus.

While the magnitude of this crisis is unprecedented, there are still valuable learnings from past events like SARS and the 2008 economic crisis that are applicable. This report has been updated with recent learnings from China and around the world on brands that have dealt sensitively and positively with this crisis, and how consumer behaviour has changed and will continue to change.

China is now slowly getting back to work and whilst most of our efforts are around immediate recovery and support, brands will need to be prepared to swiftly shift from recovery to rebound.

In every crisis there will be winners and losers. Some companies will falter, some will prosper. We hope this paper will help readers to better navigate the now, the rebound and beyond.

To everyone, stay safe, stay home and make someone smile today!

”

危机  
Wēi Jī

*In a crisis there is always  
the seed of opportunity*

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The Chinese word for crisis carries two elements,  
danger and opportunity.  
No matter the difficulty of the circumstances,  
no matter how dangerous the situation,  
at the heart of each crisis lies a tremendous opportunity.

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# Taking stock and looking ahead

There was hope initially that the COVID-19 outbreak would remain contained in China. However, the aggressive spread globally means that the EIU believe that around half of the world population could be affected.

The magnitude of the economic losses will depend on how the outbreak evolves, although there are now signs of China emerging from the slump.

While clearly not the first time we have faced a crisis, globalisation and digital mean this is one we face with

unprecedented connectivity and interdependence, bringing new challenges, and new opportunities too. We know stronger and more adaptable brands are better primed to survive and strive during and after a crisis.

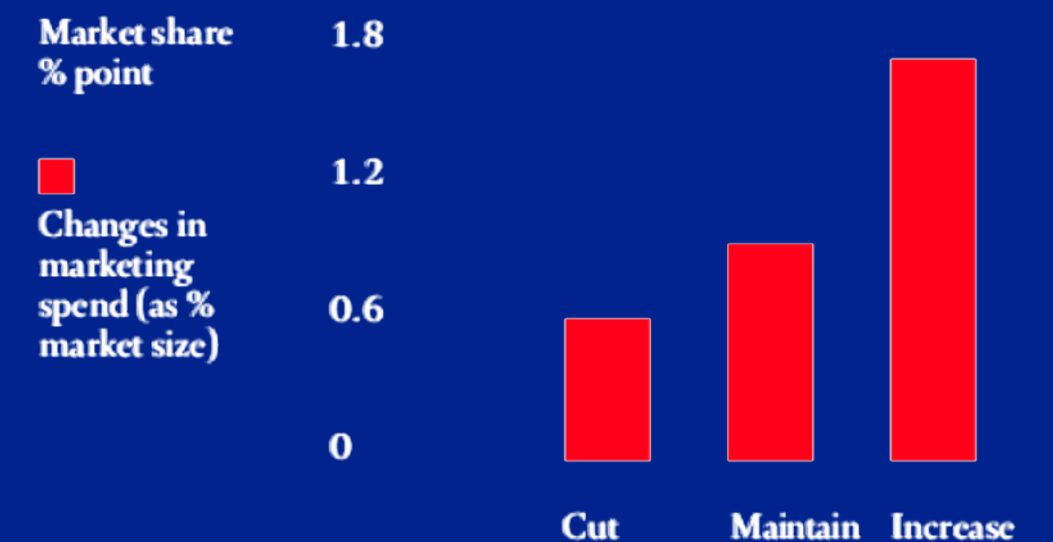
Brands need to be considering implications, not only on the health of their business but on that of their relationships with all their audiences and stakeholders.

As marketers, the key challenge in dealing with a crisis as dynamic and pervasive as this one, is the ongoing uncertainty.

Even before the outbreak, we entered 2020 and the Year of the Rat anticipating growth pressures. COVID-19 is making an agile response more crucial than ever.

Ogilvy has created this document to leverage the lessons of the past and help prepare marketers for smart and decisive action, at every stage of the unfolding situation.

Brands that get it right are able to capture up to **3x more market share** through a downturn, and rebound faster and stronger when good times return, **for lasting competitive gains.**



Increase in market share in first 2 years of recovery (Source: Hillier, Tony: Successful Competitive Strategies for Recession and Recovery)



# SARS, a notable precedent

During the nine-month outbreak, more than 8,000 cases of SARS were confirmed and 774 people died — 648 of them in Mainland China and Hong Kong. Initially the Chinese institutions were playing catch-up, but over time they came to terms with the challenge. The Chinese government has an unparalleled ability to marshal resources, and Chinese culture prizes stoicism and the ability to work through hardships.

SARS was the tipping point for the internet as a mass medium in China as people looked to mobile phones and the web for information and updates about the outbreak. Shares in Sina, Sohu, and Net Ease soared. Investor interest in Chinese technology took off. It also triggered the digital home entertainment market as millions of people, confined to homes or dormitories, looked for distraction.

It is seen as the point that led to Alibaba taking off as those millions, afraid to go outside, began to shop online. Recovery was also rapid and most Asian economies bounced back. Shares in Cathay Pacific Airways tumbled 30 per cent from December 2002 to April 2003 only to nearly double in the next year as populations proved keen to not only return to normal, but make up for lost time.



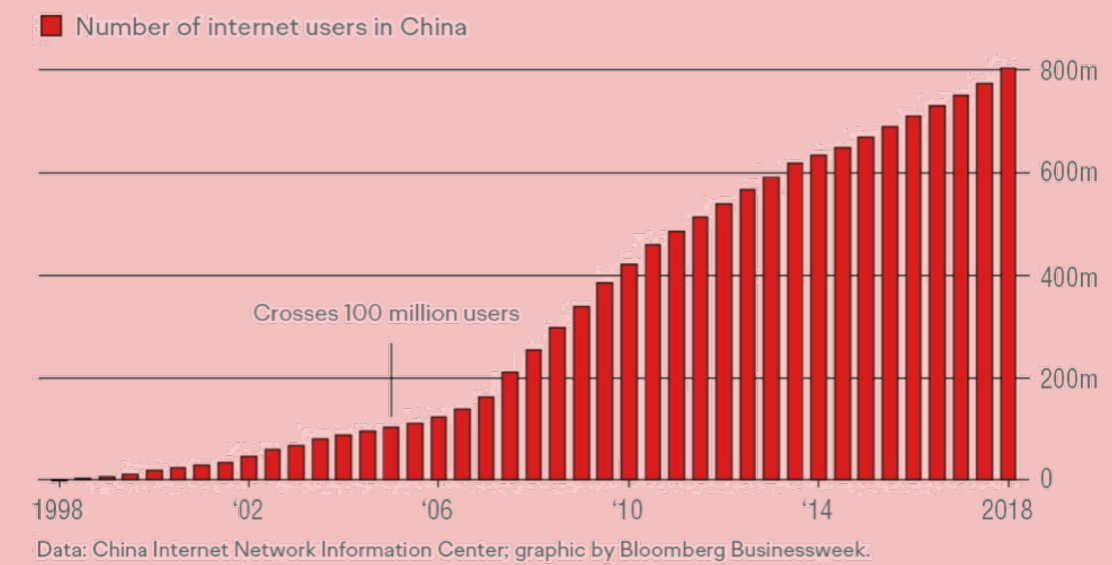
# Much is different this time

*CHINA IS THE BELLWETHER OF GLOBAL GROWTH*

## From sixth-largest economy at time of SARS, to second today



## Web Supremacy: China internet users top combined population of Japan, Russia, Mexico and U.S.





# 5 Lessons

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*Despite the differences, 5 timeless & timely lessons from the past are relevant today:*

## 1

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***'BLACK SWAN' EVENTS CAN BREAK A BRAND – OR MAKE IT***

'Black Swan' events like SARS, the 2008 GFC or COVID-19 are moments-of-truth for brands (and marketers) of their purpose, values, commitments; but equally of their agility, creativity and spirit.

## 2

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***THERE WILL BE ANAFTER***

We don't yet know when, but when it happens, it will happen fast, releasing pent-up demand.

## 3

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***BUT IT WILL BE A DIFFERENT PLACE***

Marked by lasting shifts, both attitudinal and behavioural, creating new needs, new priorities and new competitive opportunities.

## 4

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***THE KEY IS MANAGING ALL TIME HORIZONS***

Marketers who manage to turn crisis into opportunity are those who consider and address impacts across the short, mid and long term.

## 5

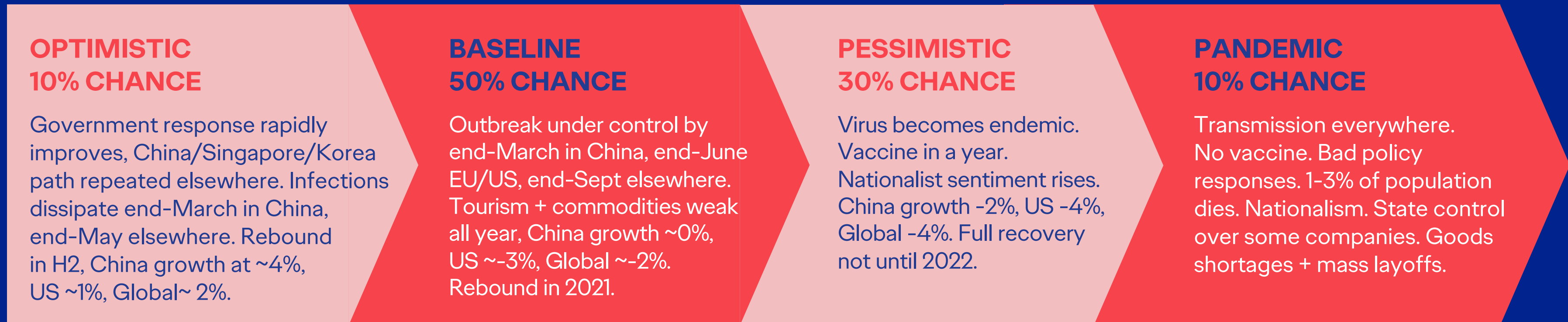
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***BE PREPARED***

Fortune favours the prepared, agile and decisive – true in good times, even more so in testing ones.

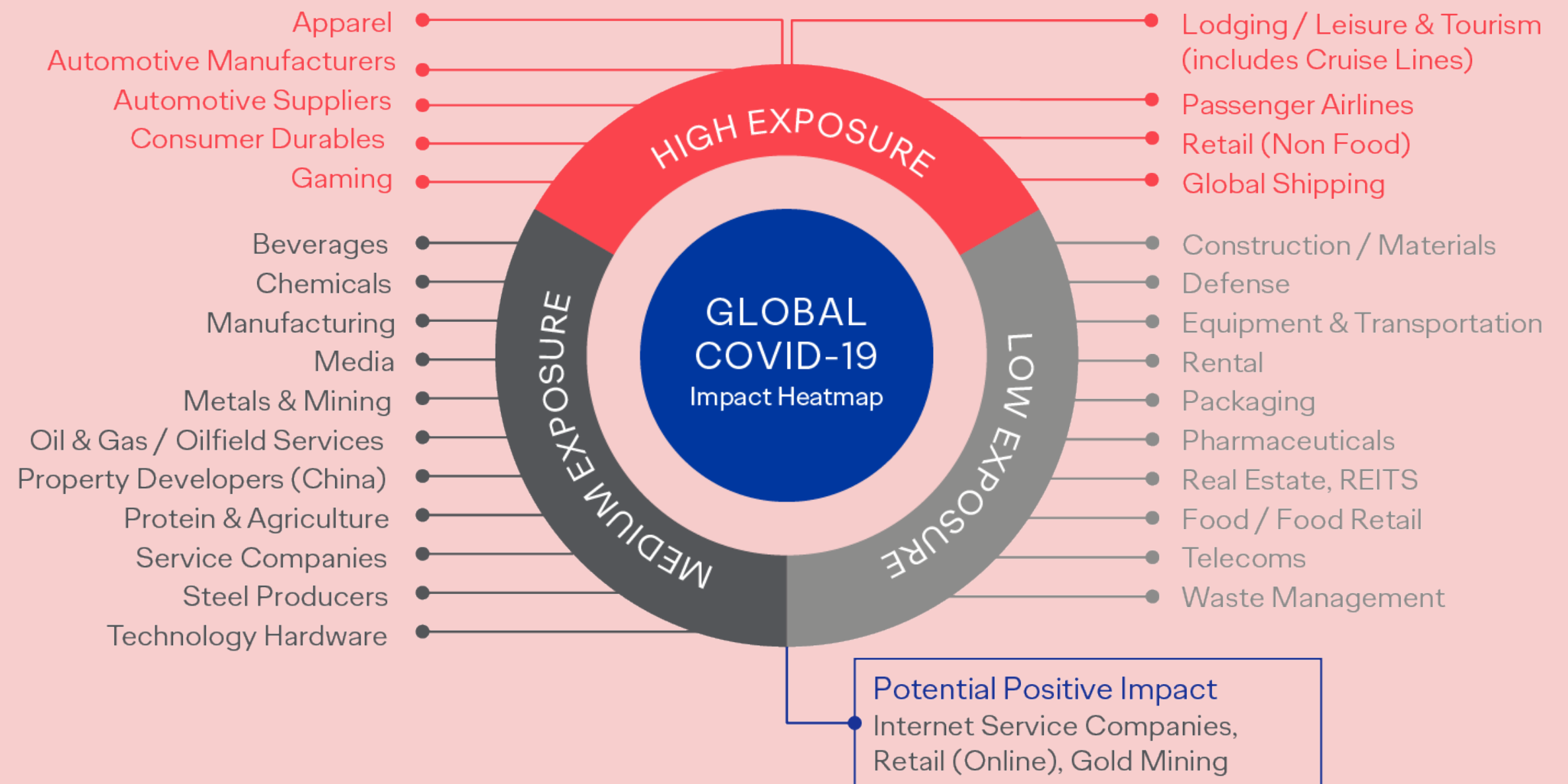


# Four scenarios for COVID-19



Source: The Economist Intelligence Unit

# COVID-19 INDUCED ECONOMIC DISRUPTION WILL DISPROPORTIONATELY IMPACT SOME INDUSTRY SECTORS MORE THAN OTHERS



Source: Moody's, Covid-19 Impact Heatmap, Coronavirus disrupts supply chains

## *Brand challenges now*

# WHAT IS CURRENTLY ON MARKETERS' MINDS?

**HOW DO WE KEEP OUR  
RELATIONSHIP WITH  
OUR CONSUMERS GIVEN  
THE ABSENCE OF A  
PHYSICAL STORE?**

How do we *identify*  
*new occasions* and  
behaviours to drive  
relevance and trial?

**HOW CAN WE MOVE  
FROM A PHYSICAL TO A  
VIRTUAL CONFERENCE/  
MEETING/PRODUCT  
LAUNCH EFFECTIVELY  
AND SMARTLY?**

*How do we innovate  
to find new ways to  
deliver solutions and  
services in line with the  
new reality and new  
behaviours?*

How do we promote our  
business *without being  
perceived as taking  
advantage* of  
the situation?

**HOW DO WE EXTEND  
BRAND PROPOSITIONS  
INTO SERVICES AND  
CONTENT TO KEEP  
AUDIENCES INFORMED  
AND CONNECTED?**

How do we *shift from  
offline-reliance* to online  
and delivery-based  
ecosystems?



# CEO LEARNINGS THROUGH COVID-19: FLEXIBILITY, AGILITY AND TRANSFORMATION

## CONCERNS IN 2020



## LEARNINGS IN 2020



Source: Nielsen China, Nielsen CEO survey on COVID-19 in Mar 2020 (n=20)  
Q9. What is your Biggest Concern over the next 12 months, and your Biggest Learning over the past 2 months?

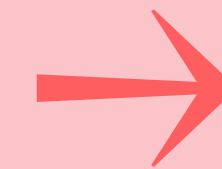
# How to make your brand matter across all time horizons

In times of crisis even more than in 'normal' times, a key challenge is to **reconcile the distinct dynamics and requirements of different time horizons** - winning in the now, while preparing for the medium-term, and transforming for longer-term growth in changing times.

Ogilvy's OS helps marketers **manage their brand as a holistic and agile system** - where every action, every experience, builds the brand and business in interconnected ways.

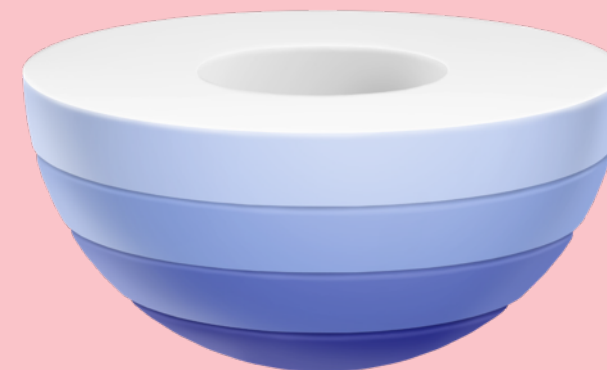
In times of crisis, the OS helps marketers prioritise actions to take in the heat of the outbreak, while looking ahead to ensure their brands are **primed to take advantage of the recovery and 'new normal' beyond.**

**MATTER  
LONG TERM**  
*(New Normal)*



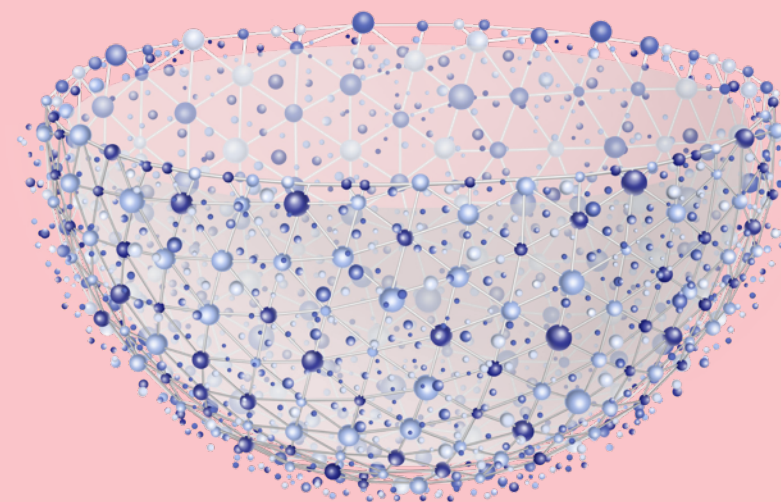
How do we get on the front foot in a changed landscape?  
\* transform & be fit-for-purpose

**MATTER  
MEDIUM TERM**  
*(Recovery phase)*



How do we make up for lost ground?  
\* leverage shifts & drive momentum and competitive edge

**MATTER  
RIGHT NOW**  
*(Acute outbreak phase)*

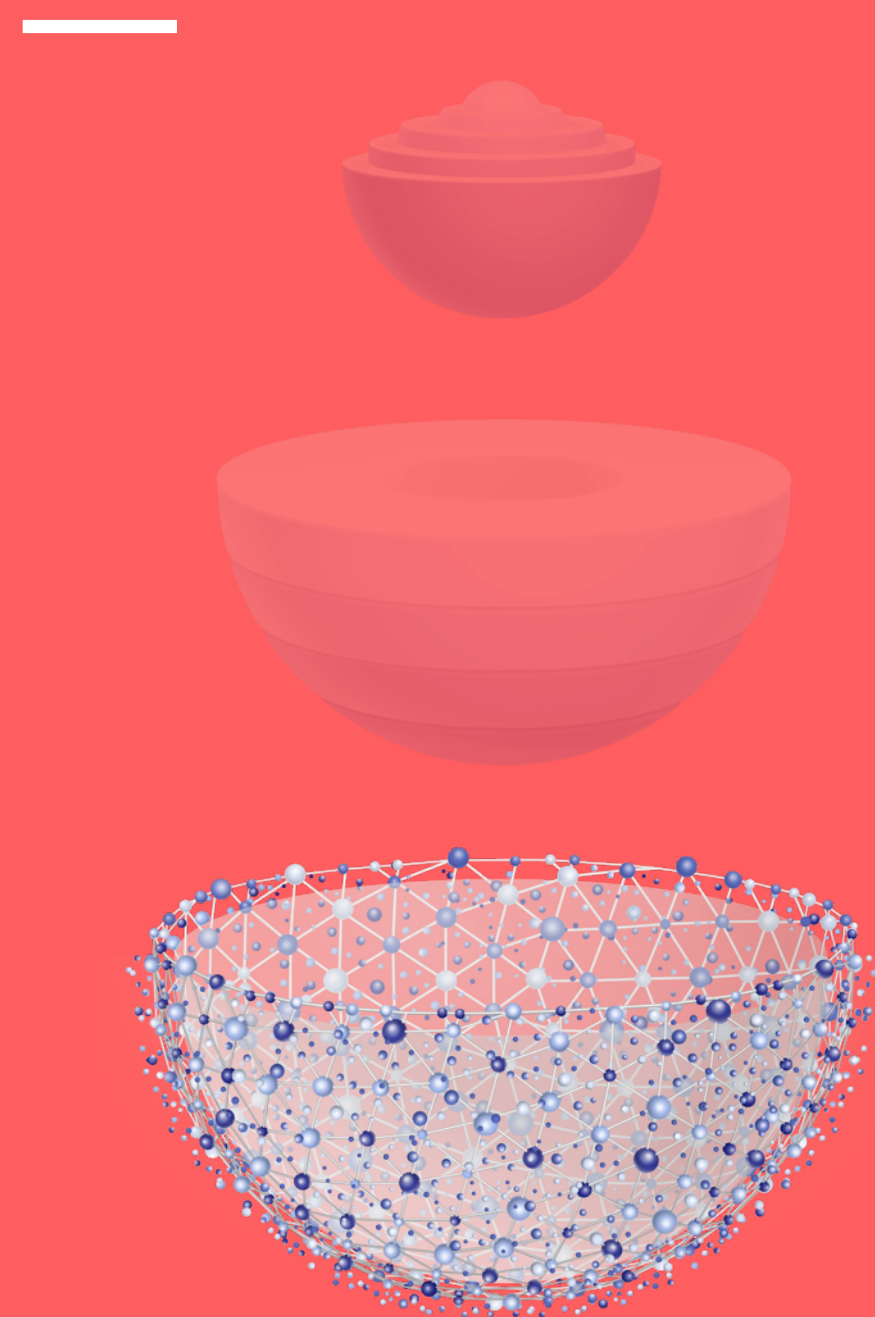


How should we respond in the unfolding situation?  
\* be agile & optimise

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*Brand actions  
to matter right now:*

## DURING THE ACUTE PHASE OF OUTBREAK



### ACTIVATE PURPOSE & OPTIMISE FUNNEL MIX

#### *SUSTAIN SHORT-TERM SALES*

- \* **Maintain saliency but don't be opportunistic.**
- \* **Re-allocate spend behind most topically-relevant segments** and SKUs.
- \* Optimise channel mix for shifts in media consumption.
- \* Rise above self-serving and transactional - tailor messaging and offers in real-time, to respond to shifting topical needs and emotions.
- \* Sustain broad reach to facilitate new users exposure and trial.

#### *ENGAGE ALL AUDIENCES AND STAKEHOLDERS*

- \* Beyond customers /consumers comms, **carry out stakeholder mapping** to consider the needs and concerns of all stakeholders, internal + external, individual + institutional.
- \* Leverage social channels for open & real-time response and communication.
- \* Identify opportunities to **create 'shared value' programs**, mobilising and connecting all parties for common benefit.

#### *ACTIVATE YOUR PURPOSE*

- \* **Do more, say less.**
- \* Activate brand purpose (or make sure you've identified a genuinely meaningful one) to support hygiene and virus containment efforts, and keep life (and livelihoods) going. Add 'brand-aligned' value to people, the community, and broader nation.
- \* **Not every brand needs to turn 'caregiver'**: support across all needs and emotional need-states, in line with brand benefit and persona.

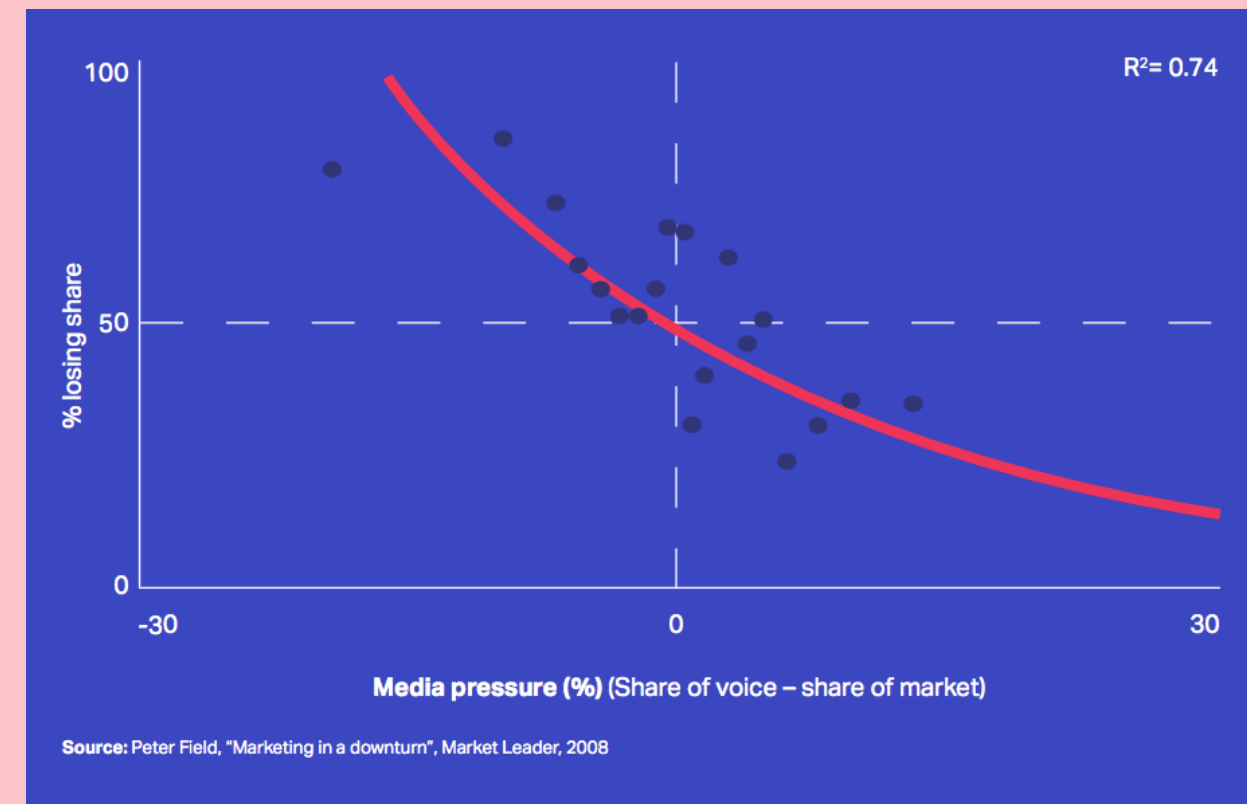
#### *SPEND SMARTER /MORE FOR LESS*

- \* Make every \$ count: leverage data analytics for full funnel optimisation & fix weak links.
- \* **Optimise drive-to-web, drive-to-commerce**; make online visibility + transaction easier.
- \* Review channel mix to secure reach vs shifts in media consumption. **Put bets on surging channels.**
- \* Identify opportunities and expand database.



*Balance short-term cost cutting needs vs potential weakened brand health through extended off-air periods*

**ADVERTISING INVESTMENT REDUCES RISK**  
354 BRANDS GROUPED ON THE BASIS OF RELATIVE ADSPEND



**PROBABILITY OF SHARE GROWTH/ DECLINE**

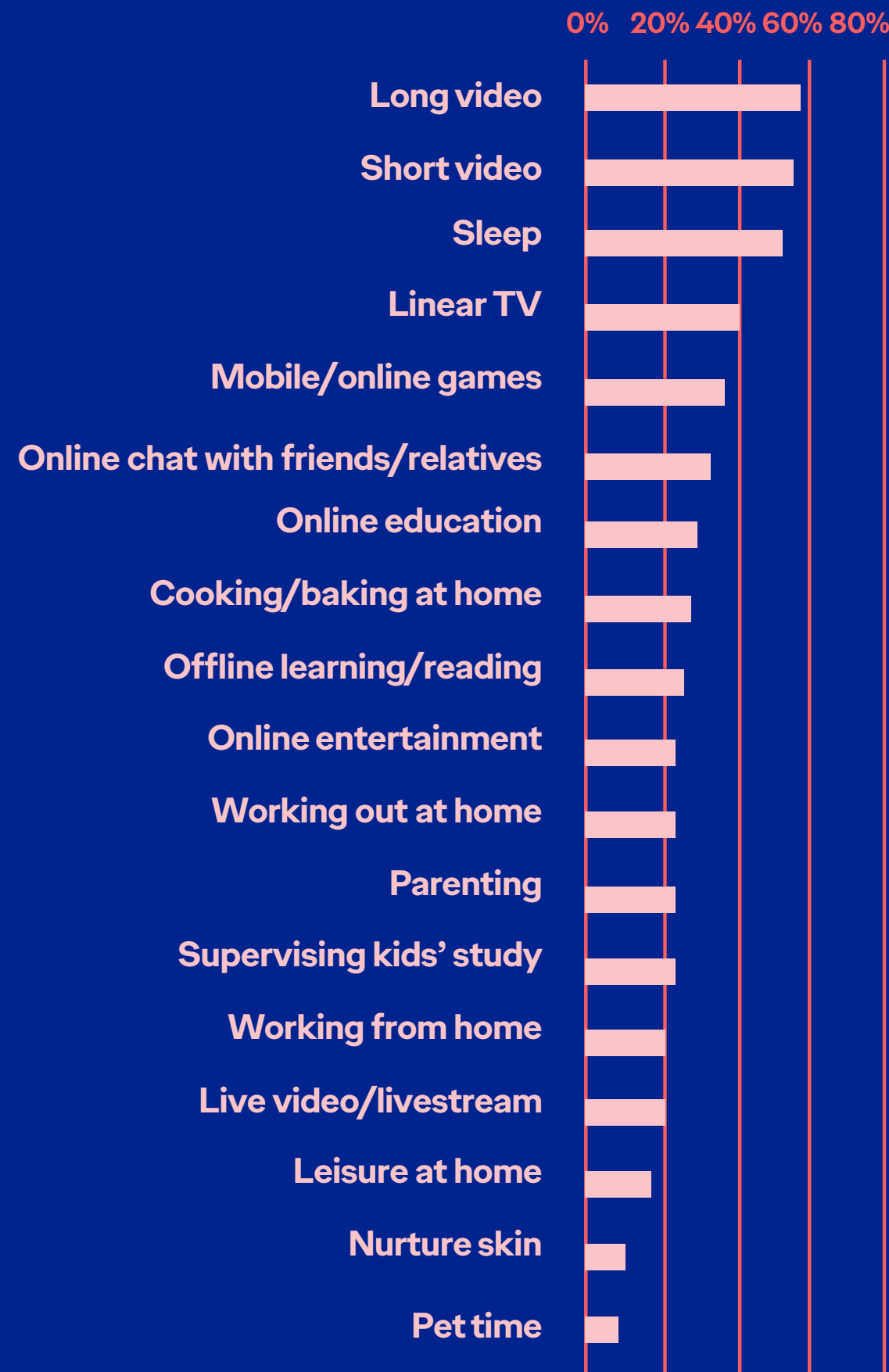


Source: Kantar Millward Brown, July 2018

*Brand actions to matter right now:*

ADJUST CHANNELS AND CONTENT MIX FOR SHIFTS.

—  
PUT BETS ON SURGING CHANNELS AND NEW ACTIVITIES THAT DRIVE SHORT-TERM SALES IMPACT



*Be where people are now. Support what they're doing now.*

People's attitudes and behaviours are changing during COVID-19. As a brand this is a moment to recognise, connect, engage and support these new changes.

Adjusting channel mix, content and potential partnerships will help secure efficient reach as well as relevance.

Responding, adding value and being agile in the NOW, especially in lower-familiarity areas where people will most value support and be open to new brands and will support relevancy in the LATER.

Source: <https://us.kantar.com/business/brands/2020/survey-measures-coronavirus-outbreak's-impact-on-china's-consumption/>

# What Matters Now

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<i>From</i>		<i>To</i>
<i>Purpose in words</i>	➔	<i>Purpose in action</i>
<i>Self interest</i>	➔	<i>Act like a leader</i>
<i>Brand Strategy</i>	➔	<i>Brand as shared agenda</i>
<i>Competitors</i>	➔	<i>Partnerships</i>
<i>Traditional Products</i>	➔	<i>Relevant products and services</i>
<i>Use power for profit</i>	➔	<i>Use power for impact</i>
<i>Customers</i>	➔	<i>Inclusion</i>



*Brand actions to matter right now:*

# TO SUPPORT PEOPLE'S HEALTH AND SAFETY



**Unilever** globally committed to provide free soap, sanitiser, bleach and food to the value of €100 million. Around half of this will go to the COVID-19 Action Platform of the World Economic Forum.



**Baidu** upgraded its real-time 'epidemic area' map in more than 200 cities, helping protect public health and safety. The app pops up a geotagged "epidemic reminder".



**Ogilvy** is one of 35 agencies in Spain working with five industry bodies to use the collective power of advertising to fight the spread of COVID-19.



**Nike USA** advocates for the need for social distancing in the fight against COVID-19.

*Brand actions to matter right now:*

# TO SUPPORT PEOPLE'S HEALTH AND SAFETY



Employee stories in critical areas



CSR - 'Cheer for Wuhan' cash and food donations



Delivery - Encourage and support delivery staff



Support frontline caregivers



Safety - Safe dining tips and contactless delivery

**YUM China and its KFC brand** stood out during the crisis. With over 9,000 stores (of which more than 30% were shut) and 450,000 employees, Yum China navigated this crisis in a skilful and calm manner. No staff were laid off, a massive shift into delivery was managed, and even innovation happened during this time, with KFC offering raw meals for home preparation and contact-less delivery services. KFC contributed to the relief efforts and refocused its communications around employees and food safety.



*Brand actions to matter right now:*

# TO SUPPORT PARTNERS, SMALL BUSINESSES & COMMUNITIES



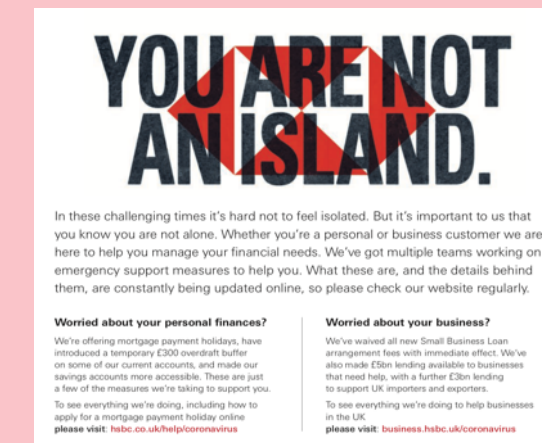
**Zoom US** offered free videoconferencing platform to K12 schools in many countries globally as well as providing extra features for on-line learning.



**Vans** will donate proceeds from each pair of custom designed footwear to their small business partners in this time of need.



**Alibaba China** announced 20 measures to help businesses and merchants in China, which included providing financial support, flexible job opportunities and more operational tools.



**HSBC** announced a support package to help their customers; including mortgage payment holidays, overdrafts and pledged £5 billion to help struggling businesses.



*Brand actions  
to matter right now:*

NOT ALWAYS  
ABOUT PUBLIC  
SERVICE,  
BRANDS CAN  
ALSO PROVIDE  
POSITIVITY AND  
UPLIFT



—  
**IKEA Taiwan** leveraged its brand promise of 'bringing joy into the home' and creative cheeky persona, to bring light relief to all those forced to spend Valentine's day quarantined at home.



—  
**Chipotle UK** created 'Chipotle Together' lunchtime hangouts on Zoom featuring celebrity guests as a way of coping with social distancing.



—  
E-commerce giant **JD.com** is collaborating with a series of alcohol brands to create a virtual nightclub experience for self-isolators.

*Brand actions  
to matter right now:*

NOT ALWAYS  
ABOUT PUBLIC  
SERVICE,  
BRANDS CAN  
ALSO PROVIDE  
POSITIVITY AND  
UPLIFT



**TikTok** launched a new entertainment and information initiative to help lighten the mood amid lockdowns. #HappyAtHome saw well-known entertainers share live-streams on the platform.



**Time Out** have temporarily changed their name to Time In to remain relevant during social distancing. They have also updated their website with articles that offer inspiration for things to do at home.



**Bottega Veneta** launches a virtual residency to provide a much-needed escape. The multi-platform concept will celebrate creativity in all its forms, with live music performances and movie nights.

*Brand actions to matter right now:*

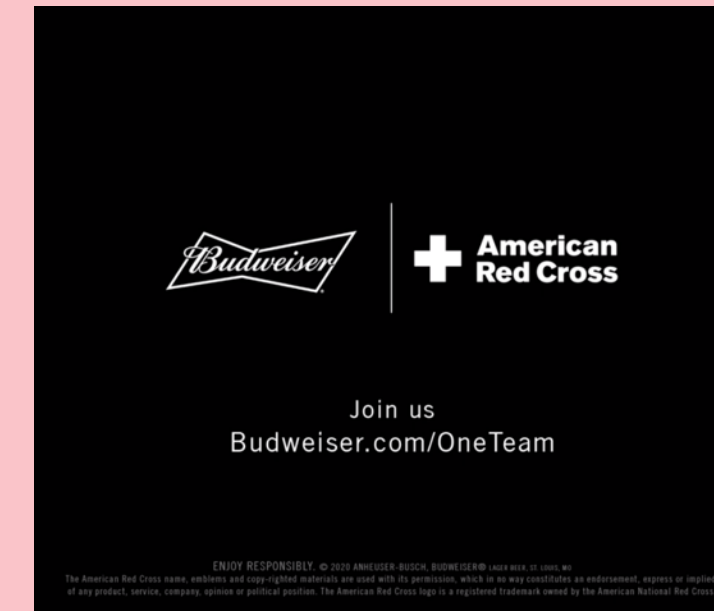
# AS A FORCE FOR GOOD; CHANGING FOCUS



**Ford USA** is pulling all ads promoting its vehicles with a new campaign describing their response to COVID-19, including giving Ford Credit customers some payment relief.



**Coca-Cola Philippines** are halting all commercial advertising and redeploying funds to provision of protective equipment, delivery of food packs to the most vulnerable families, and support for affected small retailers.

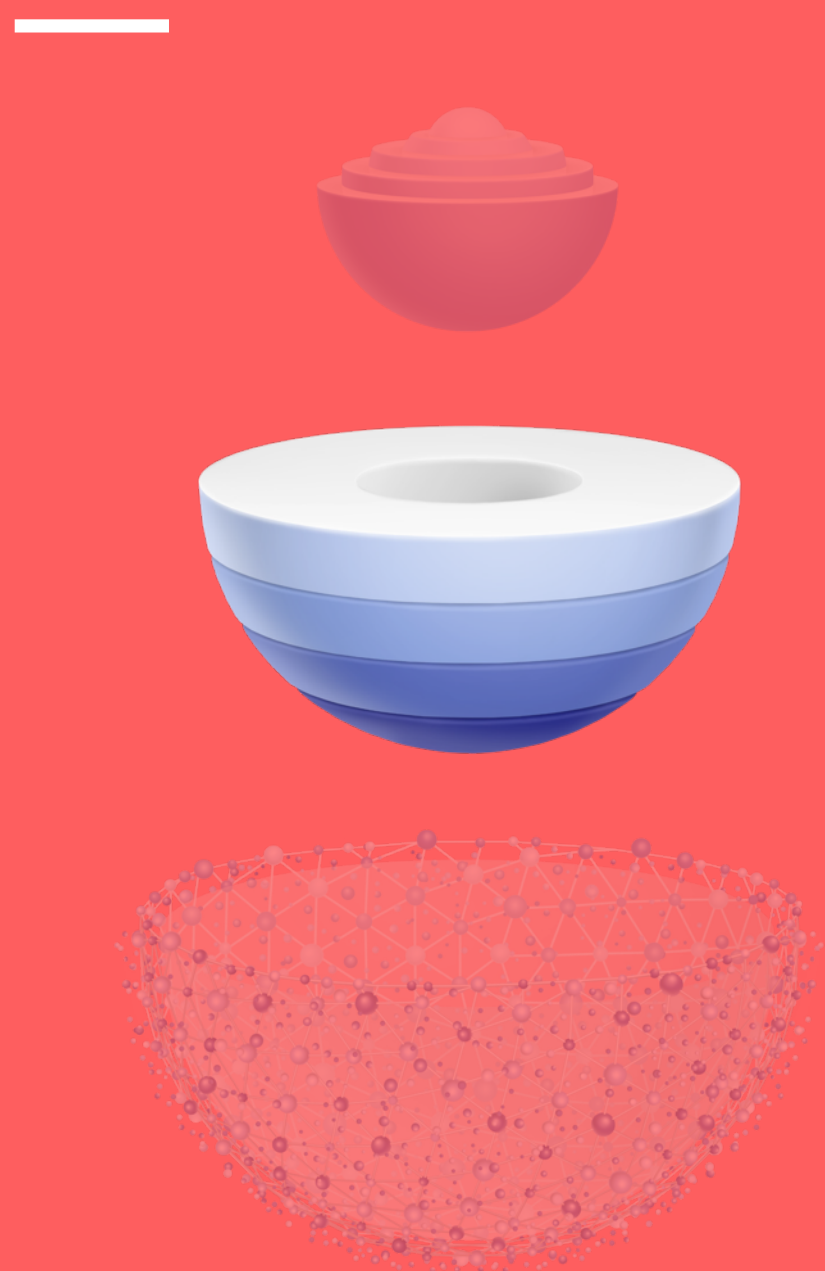


**Anheuser-Busch InBev** is redirecting \$5 million that it normally spends on sports and entertainment marketing to the American Red Cross to support the fight against the pandemic. The donation comes as the sports world remains shut down.



*Brand actions to matter medium term:*

## DURING THE POST-OUTBREAK RECOVERY



### IN THE RECOVERY PHASE, MAKE UP FOR LOST GROUND BY PRIMING MOMENTUM & LEVERAGING SHIFTS

#### FUEL BRAND SALIENCY

- \* Sustain spend and earned exposure / talkability to **keep brands salient** in anticipation of the rebound.
- \* IPA data shows brands that sustain exposure throughout a crisis, **can increase share 3x** during downturns, but also **rebound faster and stronger** in recovery.

#### PRIME FOR MOMENTUM UPON REBOUND

- \* Identify **categories and segments that will most benefit from pent-up demand and economic stimulus**.
- \* Identify priority parts of portfolio with greatest potential.
- \* Work with your media agency to re-allocate budgets and secure quality ad stock.
- \* Leverage CRM and social platforms to **activate existing users, and turn new followers into trialists**.

#### INNOVATE AND RESHAPE YOUR PORTFOLIO

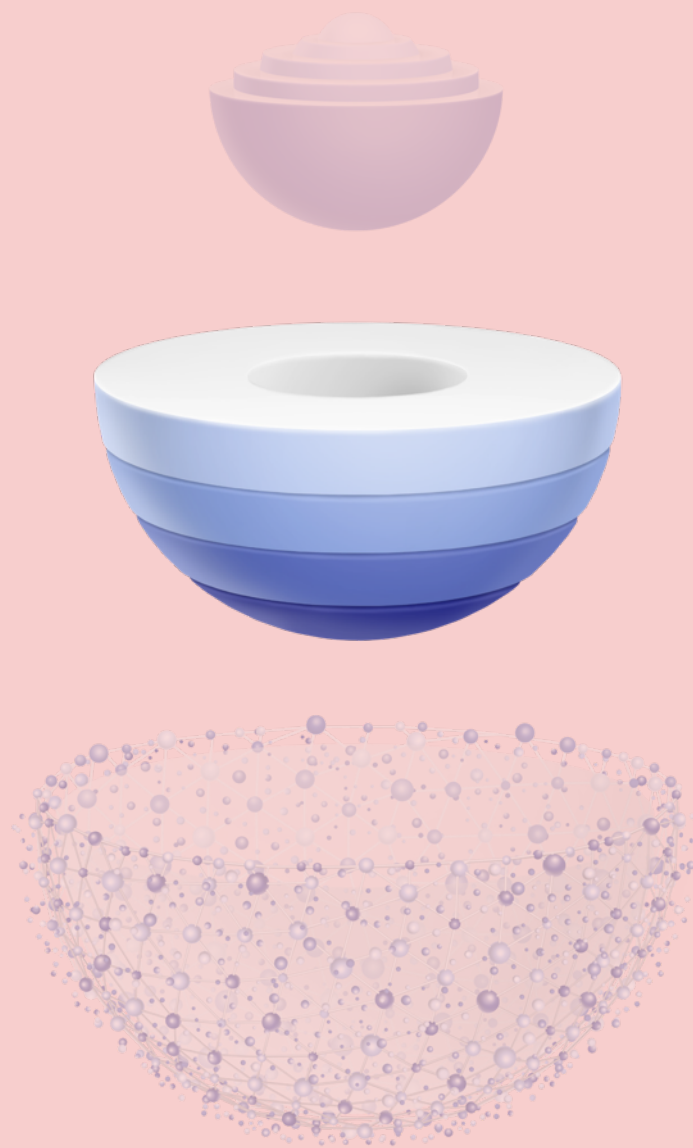
- \* Leverage data and insights to identify the most significant and lasting shifts.
- \* **Accelerate claims innovation, product innovation, CX innovation**.
- \* Consider how to leverage and strengthen **Health & Wellness** connections, across categories.

#### SHIFTS TOWARDS DIGITAL CHANNELS AND BEHAVIOURS

- \* Review Customer Engagement & Content plans.
- \* **Address new needs and priorities in Digital content / Digital services / Utility / Commerce**.
- \* Leverage martech and automation to enable more personalised and contextual creation and distribution of content in real-time.

*Brand actions to matter medium term:*

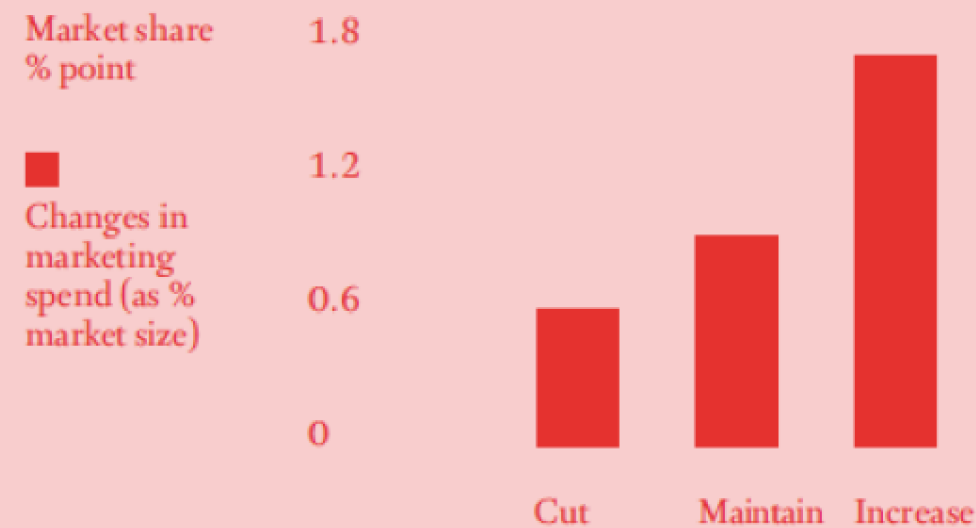
# DURING THE POST-OUTBREAK RECOVERY



## IN THE RECOVERY PHASE MAKE UP FOR LOST GROUND BY FUELING SALIENCY & PRIMING FOR MOMENTUM

### FUEL BRAND SALIENCY

'Surplus' share of spend / exposure generates faster market share gains in downturns' depressed media spend

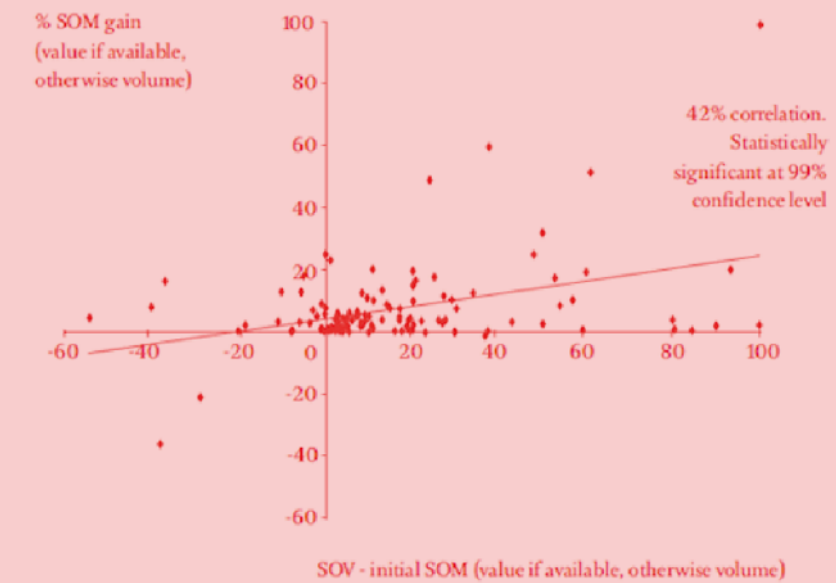


Source: Hillier, Tony: Successful Competitive Strategies For Recession And Recovery)

### PRIME FOR MOMENTUM ON REBOUND

Companies cutting investment by 50% for 1 year before returning to normal weight take up to 2 years to recover lost share.

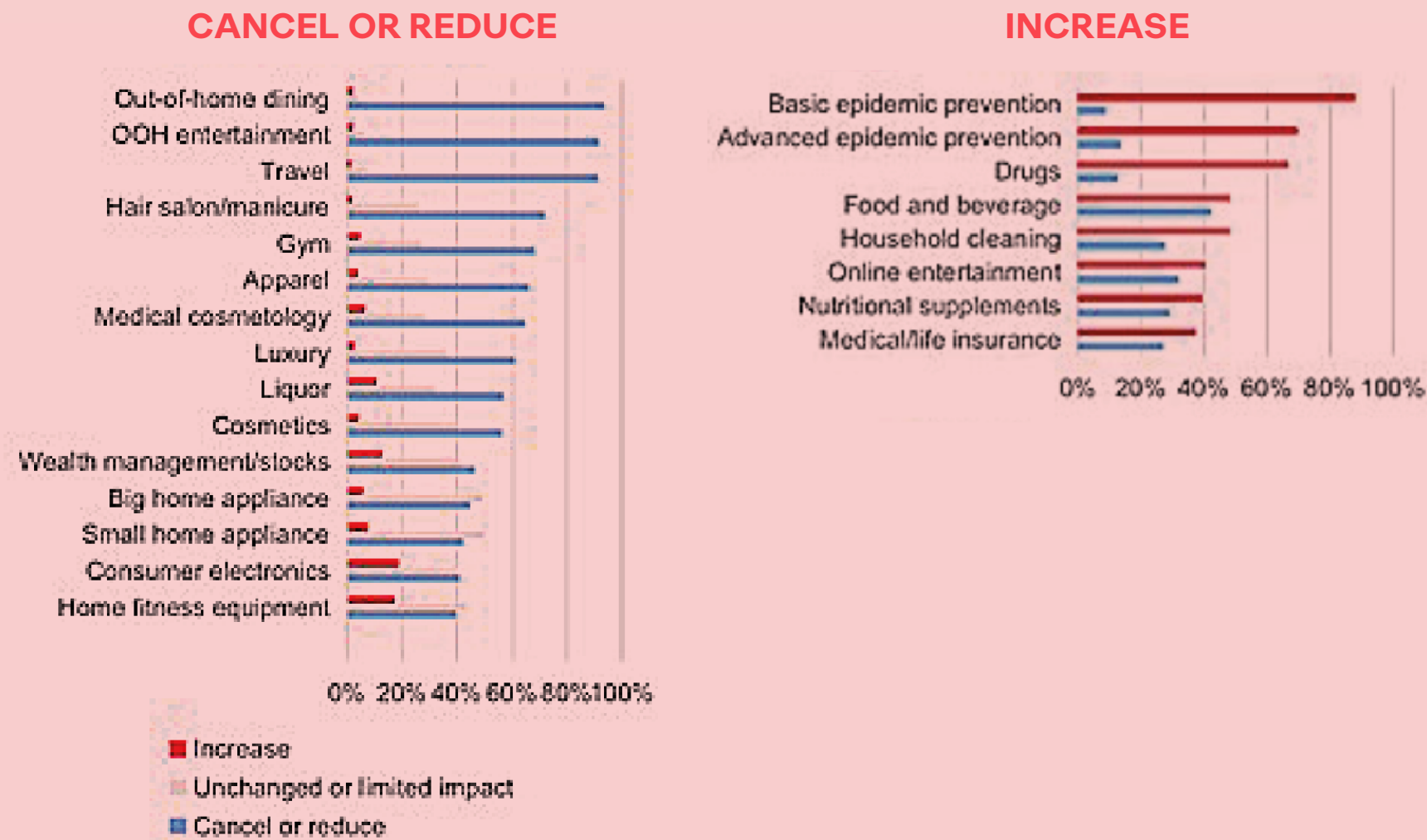
Those that increase exposure during downturn can gain up to 3x more share in the first 2 years of recovery.



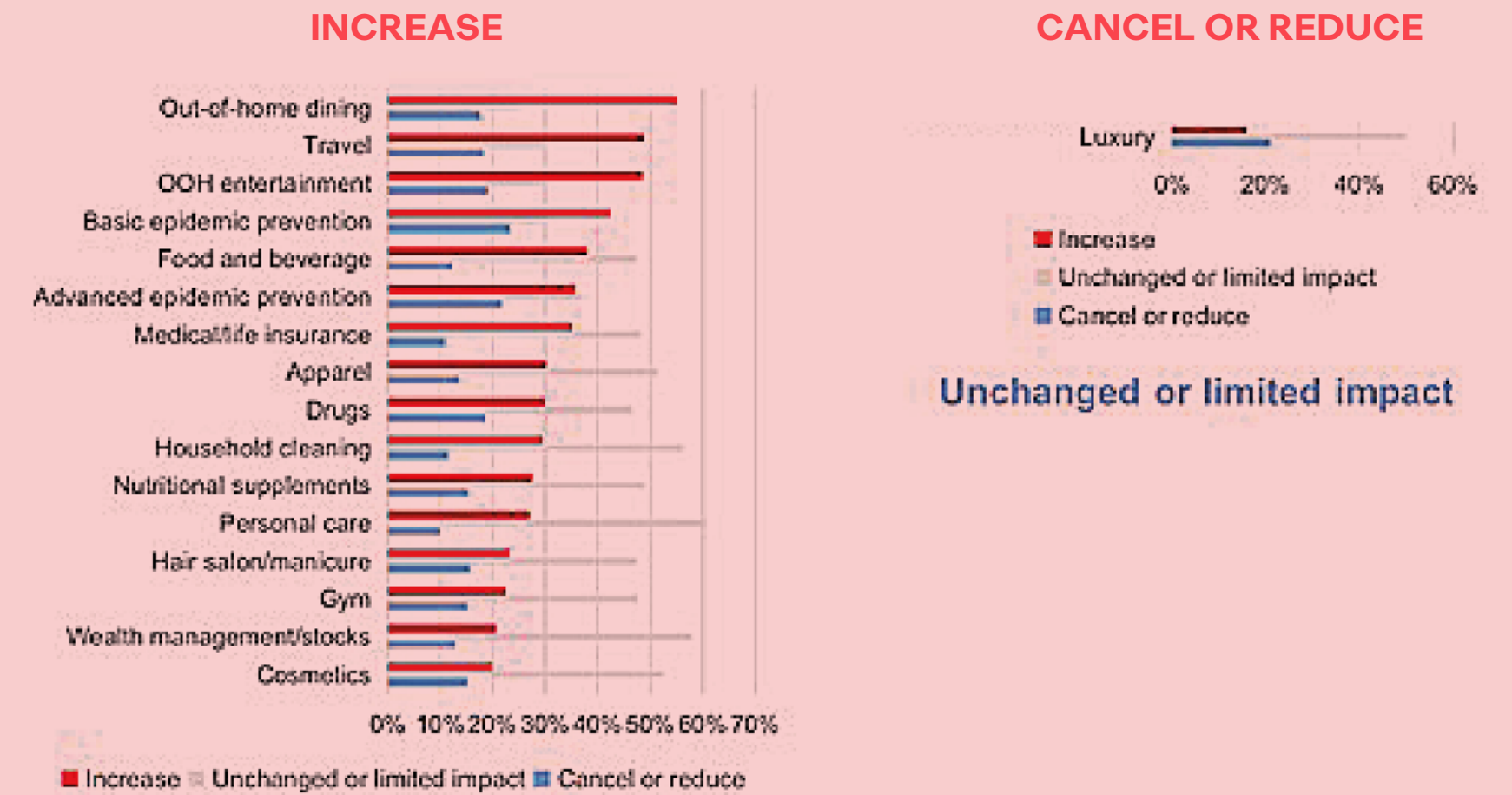
Source: Binet, Les and Field, Peter: Marketing In The Era Of Accountability, 2007 Base: 880 successful marketing campaigns, 1979 - 2006

*Brand actions to matter medium term:*  
**CATEGORIES ARE BEING AFFECTED**  
*– AND WILL REBOUND, DIFFERENTLY*

**DURING OUTBREAK**



**AFTER OUTBREAK**



Source: <https://us.kantar.com/business/brands/2020/survey-measures-coronavirus-outbreak's-impact-on-china's-consumption/>

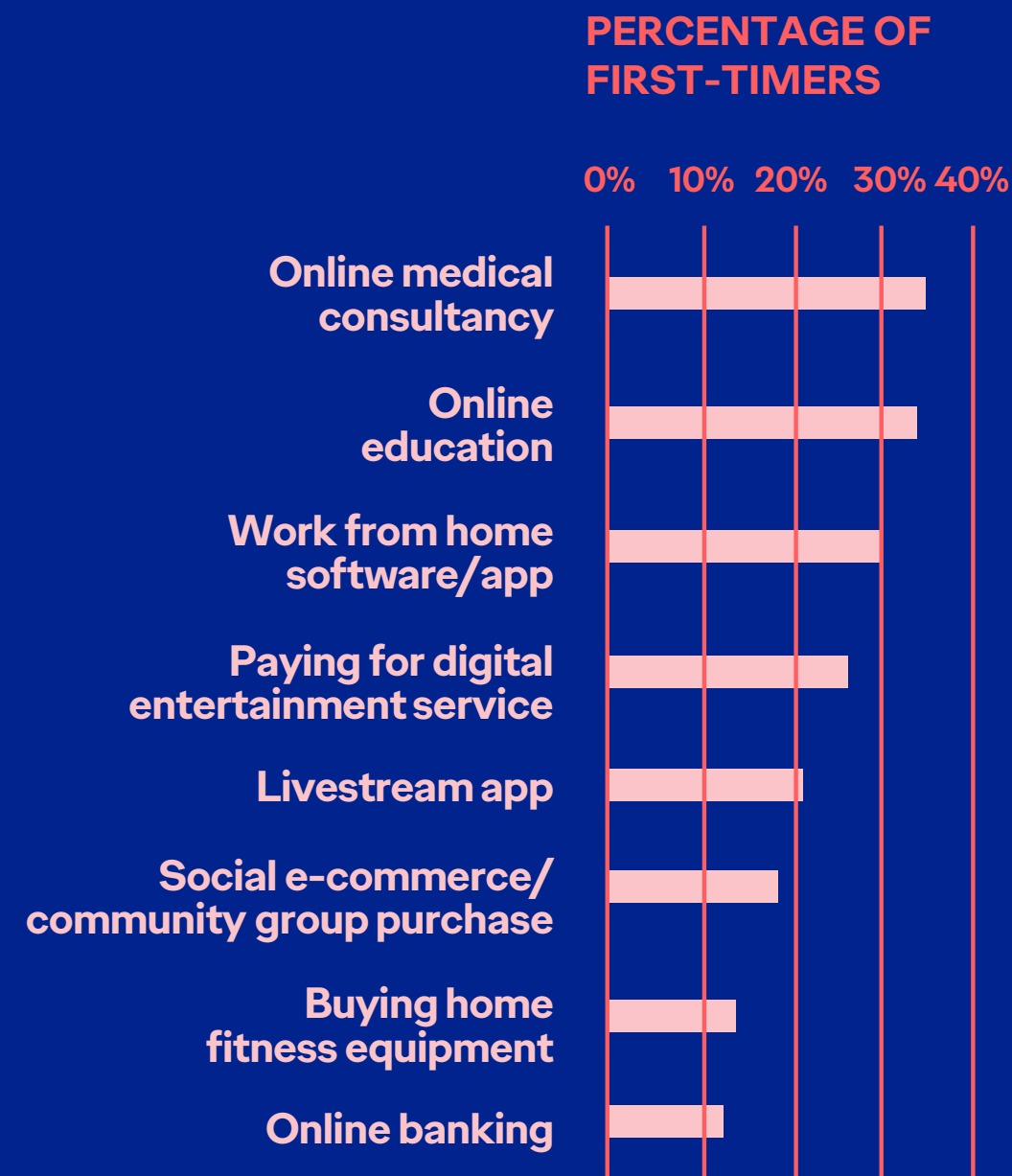


*Brand actions to matter medium term:*

# CATEGORY FIRST-TIMERS ARE AN OPPORTUNITY TO CONVERT INTO REGULAR USERS

This outbreak has also nudged/forced many consumers to try something they've never used before, creating an opportunity for many new sectors.

84% tried at least one new service for the first time, the highest being online medical consultancy (34%) and online education (33%), followed by working from home software/app (29%) and paying for digital entertainment service (26%).

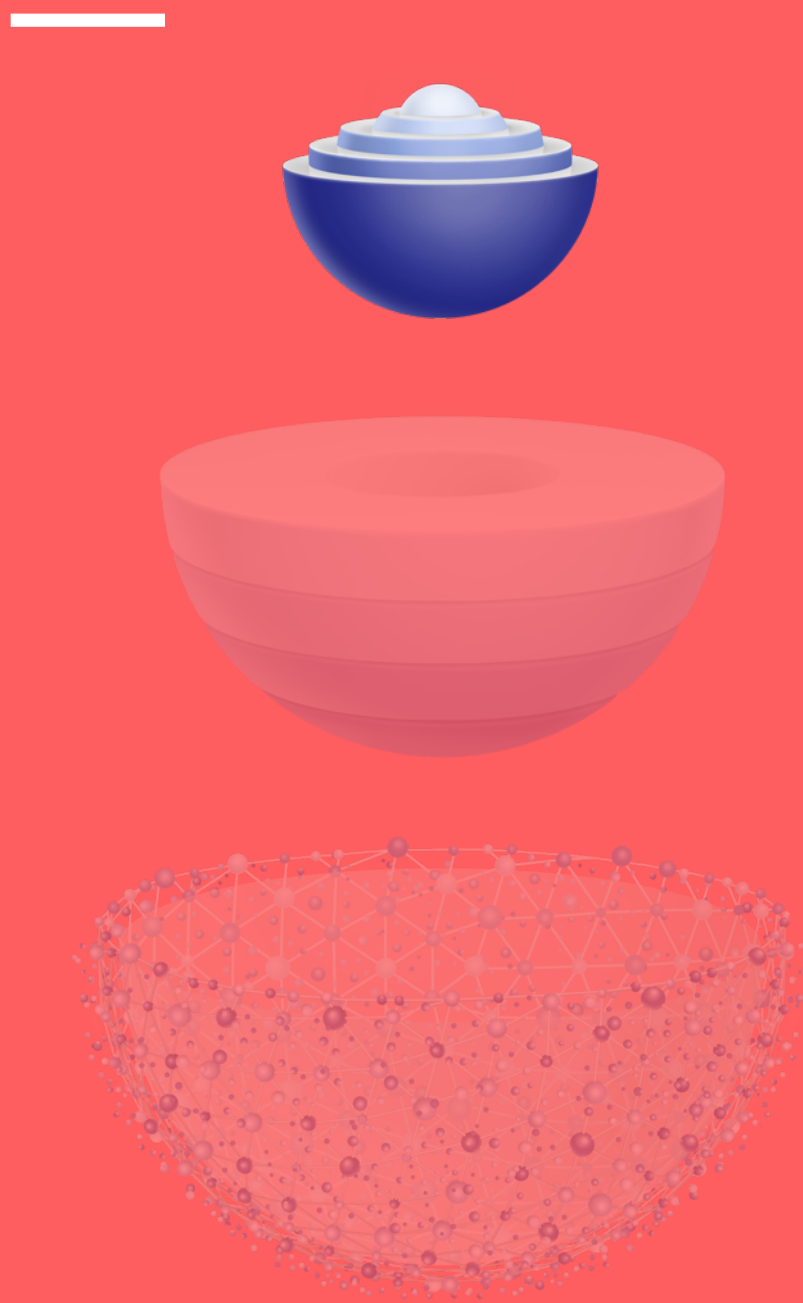


Brands can look for opportunities for disproportionate share gains by activating their loyal users' endorsements, and competitively-designed promotions – eg bulk buying incentives that secure franchise through the event and beyond.

Source: <https://us.kantar.com/business/brands/2020/survey-measures-coronavirus-outbreak's-impact-on-china's-consumption/>

*Brand actions to matter long term:*

# DURING THE NEW NORMAL PHASE



## TRANSFORM TO LEAD IN A CHANGED LANDSCAPE

### BRAND TRANSFORMATION

\* **Re-evaluate brand positioning, proposition and portfolio** priorities for accelerated growth in new landscape / segments.

\* Identify opportunities for first-mover edge, serving future needs by creating or modifying a product / service / experience.

### SUSTAINABLE TRANSFORMATION

\* Turn **crisis-time 'CSR' into ongoing purposeful brand engagement** - across full value chain, and across all stakeholders.

\* Innovate to create shared value and drive impact across locally- and category-relevant SDGs.

### CE & CX TRANSFORMATION

\* Re-evaluate Customer Experience for greater **personalised value and responsiveness**.

\* Accelerate employee experience transformation for greater personalised engagement, productivity and flexibility.

\* Leverage data and Martech to **enable personalisation-at-scale**.

### CRISIS & REPUTATION TRANSFORMATION

\* Implement **crisis preparedness plans**, incl. risk-assessment audit, crisis response plan and training, reputation repair plans.

\* Update **stakeholder and influencer ecosystem** - focus on top 100 stakeholders.

\* Revisit Public Affairs strategy and activation plans.

### DIGITAL TRANSFORMATION

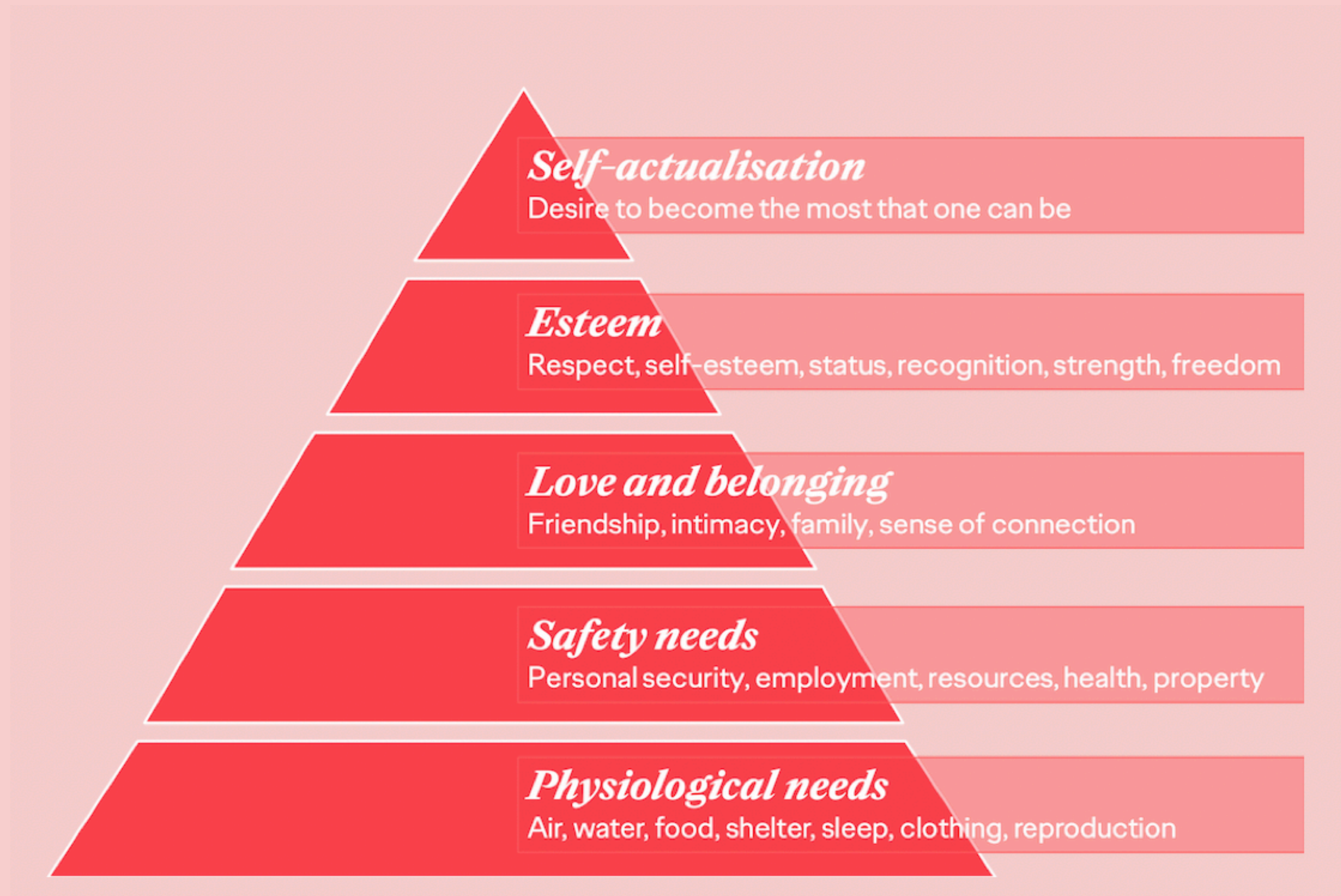
\* Revisit and prioritise digital transformation goals, strategy and roadmap.

\* **Accelerate shift to mobile and e-com-first business models**.

\* Scale digital channels and innovation that proved successful during the crisis: social commerce, live streaming, delivery, online customer service, agile production, martech.

# BRANDS SHOULD ADAPT TO NEW ROLES AROUND CONSUMER NEEDS PRECIPITATED BY COVID-19

*As we emerge from the  
crisis we'll be more life  
orientated*





# THE UNEXPECTED CATALYST FOR THE NEW REALITY



**TECHNOLOGY TRANSFORMED CONSUMPTION**

Source: Nielsen China, The New Reality of 2020: Covid-19's Impact on China Retail and Consumer Landscape



# Summary

*When we come through this, the world will be a different place; decide what sort of company you want to be.*

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There will be pain and loss, but the COVID-19 crisis will eventually be behind us. The world it leaves behind will be permanently changed. We will spend less time in the air and more online. Work will be less a place and more a state of mind, and the minds we shape to live in this new world will be educated differently. And we will have adopted yet more technology.

Business will change too. Brands, especially. We have

neglected them in the mad dash to embrace digital, but now we must return our focus to long-term brand health and worship less at the altar of short-term metrics. This crisis will accelerate digital transformation, burning the laggards and lighting the way for the leaders. We will cross the remaining distance to full digital transformation faster and with a greater strategic sense.

Brands will matter more in the world COVID-19 leaves behind, but the base of a better, more resilient brand needs to be laid now, amidst the uncertainty of the crisis. Brands do that by building trust by acting, visibly and decisively, with an essential and authentic purpose.

No one can plan for the exact nature of a crisis such as this, but a tightly-woven braid of brand purpose, value, and commitment can help a

company withstand testing times.

Brands will need to find new reserves of agility, creativity, and resolve. Those that do will shape the way consumers view them in the midst of the crisis and in the new world that follows, and emerge from these uncertain times with a sharp competitive edge.

*Actions for Now  
and the Future:*

## TOP TEN CHECKLIST

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- 1** Don't wait for recovery; **adapt** to changes and focus investment on what is profitable now.
- 2** **Review** product / SKU portfolio due to changed consumer behaviour.
- 3** Disruption provides opportunity; revisit **brand value** and **differentiation**.
- 4** Think outside your **physical** brand experience. eCommerce **acceleration** plan: product mix, new channels, data systems.
- 5** Identify **new growth** opportunities: new occasions, new services.
- 6** **Maximise** the value and power of existing customers.
- 7** Use the slowdown to **innovate**.
- 8** Have a long-term brand/ portfolio **plan** centered on changed consumer **behaviour**.
- 9** **Redesign/optimize** your go to market plan: consider product mix, geography, sales channels and customer segment focus.
- 10** **Be ready** for the After. **Agility** is a must.



*Making brands matter in turbulent times:*

# HOW TO STEER BRANDS THROUGH A CRISIS

Beyond COVID-19

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**Chris Reitermann**

Chief Executive,  
Greater China and Asia  
[chris.reitermann@ogilvy.com](mailto:chris.reitermann@ogilvy.com)

**Natalie Lyall**

Head of Marketing, Asia  
[natalie.lyall@ogilvy.com](mailto:natalie.lyall@ogilvy.com)

**Benoit Wiesser**

Chief Strategy Officer, Asia  
[benoit.wiesser@ogilvy.com](mailto:benoit.wiesser@ogilvy.com)

**Scott Kronick**

Chief Executive, Public Relations  
& Influence, Asia  
[scott.kronick@ogilvy.com](mailto:scott.kronick@ogilvy.com)

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# Appendix

## Sources/links:

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### **MARKET SHARE CHANGE IN FIRST TWO YEARS OF RECOVERY FROM INCREASED MARKETING SPEND IN RECESSION**

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# Appendix

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### **PROBABILITY OF SHARE GROWTH/DECLINE**

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### **THE UNEXPECTED CATALYST FOR NEW NEEDS**

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### **NEW RESOURCES FOR LEADERS**

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### **CEO TOP LEARNINGS THROUGH COVID-19**

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### **CONSUMPTION AREAS THAT ARE STARTING TO RECOVER**

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### **WHAT MATTERS NOW**

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